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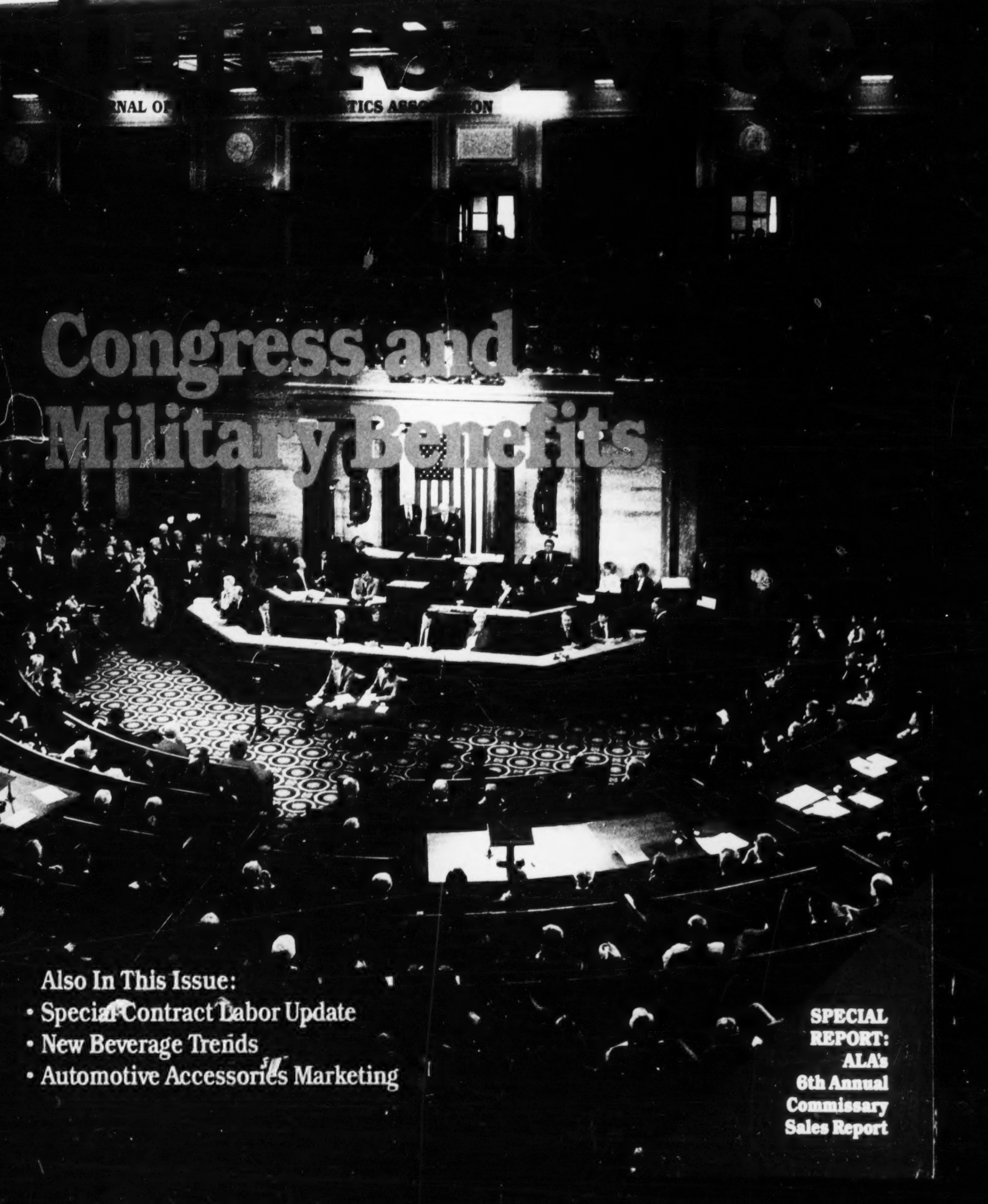

Congress and Military Benefits

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- Special Contract Labor Update
- New Beverage Trends
- Automotive Accessories Marketing

SPECIAL REPORT: ALA's 6th Annual Commissary Sales Report

PUBLISHED BY THE AMERICAN LOGISTICS ASSOCIATION

Interservice

THE QUARTERLY JOURNAL FOR THE INTERNATIONAL AND MILITARY/ GOVERNMENT MARKETING PROFESSION

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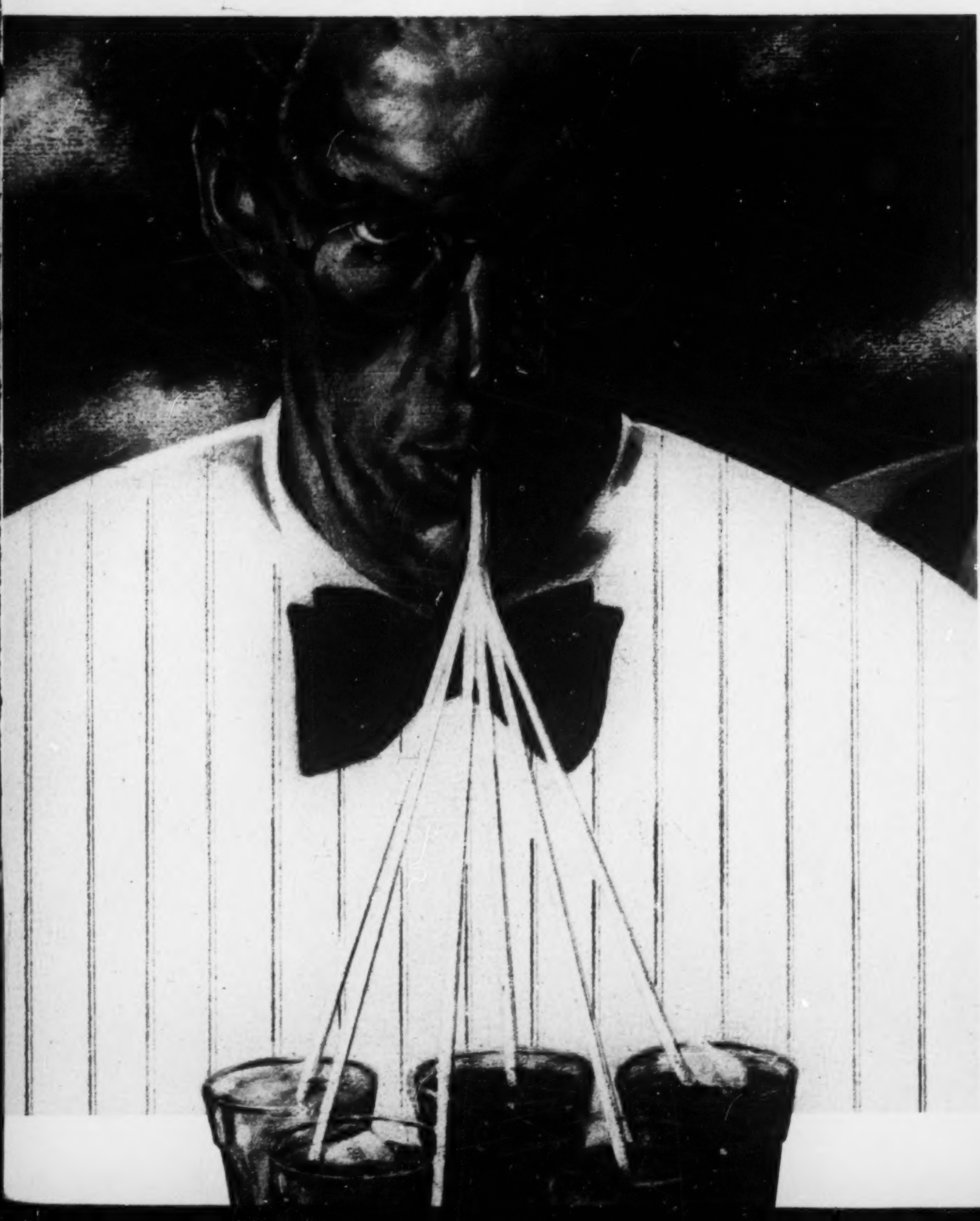
New Beverage Trends: More Than Meets The Eye

BY SANDY EVANS

Sandy Evans is a Washington, D.C.-based freelance writer. She has written widely about retailing, foodservice and business subjects for several leading newspapers and trade publications.



The next time you reach for your favorite soft drink on your grocer's shelf, you may end up with a little something extra – vitamins, minerals and real fruit juice. Those ingredients are making headlines and changing the face of the soft drink industry.

The proliferation of new products containing these ingredients and changing consumer habits are impacting beverage sales in both the civilian and military sectors.

Today, beverage industry sales are hotter than ever, with the industry registering six percent growth in 1985, according to *Beverage Industry* magazine. Juice-added and diet soft drinks gained momentum and contributed significantly to the industry's overall growth. That growth is also evidenced by the fact that Americans downed 7,070 million cases of soft drinks in 1985. Only 25 years ago, Americans consumed a paltry 2,085 million cases.

Of the four leading soft drink categories – regular, diet, club soda/seltzer and aseptics, the National Soft Drink Association, in its 1985 National Sales Summary, reports that packaged regular soft drinks captured a 76.2 percent market share. Diet took a 23.1 percent share, water 0.6 percent and aseptics, 0.1 percent.

New Taste Quenchers

The past few years have witnessed some important changes in consumer trends. As Americans have become increasingly health- and diet-conscious, they have also changed their soft drink tastes. It seemed more and more people were reaching for beverages that were lower in calories or decaffeinated. Now they're reaching for something different – it's the juice.

The past few years have spawned a host of new soft drinks, noticeably juice-added or vitamin-enriched. Some of these products include:

- Citrus 7 with added citrus juice, from Seven Up
- Nehi Froot, from Royal Crown
- Minute Maid Orange and Lemon Lime with 10% juice and vitamins, from Coca Cola Co.
- Apple Slice, Lemon Lime Slice and Cherry Cola Slice with 10% juice, from PepsiCo
- Bubble Up with 10% juice, from Dad's/Bubble Up Co.
- Apple Crush with 10% juice, from Crush International
- Wink with 10% juice, from Canada Dry.

While the addition of real fruit juice may be enhancing taste, some believe its biggest plus is that it has given soft drinks a healthful image . . . and promoted the drinks from the junk food category.

Whatever the case, soft drink manufacturers are on a roll with juice-added beverages. "We find that consumers have responded well to these products," says Scott Sanders, Seven Up Marketing Manager, National Retail Sales.

Company officials at Canada Dry, makers of Wink, reformulated with 10 percent juice, expect the juice-added soft drink segment – what the industry refers to as "value-added" – to double in volume this year.

Two years ago, *Forbes* magazine predicted that revenues from these drinks could hit at least $3 billion by 1990, about 10 percent of the industry's total.

True to form, both Coke and Pepsi are in the forefront of the juice-added beverage segment. Both companies have garnered a significant share of this segment; through Pepsi's Slice and Coca Cola's Minute Maid.

Coke's Minute Maid sodas are enjoying tremendous success, boosted by the high name recognition and association of the name Minute Maid with juice. But it is Pepsi Slice which is in the lead. The company launched its Lemon Lime Slice in 1985, and, according to *Forbes* magazine, by year's end, Slice had captured a 1.5 percent market share – adding up to sales of over $450 million. Some 90 million cases of the soft drink were sold. Last year, *Fortune* magazine listed it as one of the top products in the country.

With all its success, the company has big things in store for the product: it's aiming to become the third most popular trademark in the beverage market, according to *Beverage Industry*. PepsiCo has also expanded the Slice line with new flavors of mandarin orange, apple and cherry cola.

All of this, of course, is accompanied by aggressive marketing, including television and print advertising, coupons and special promotions. At this year's Super Bowl, for example, PepsiCo featured the "Slice Blimp" wafting over the skies of Pasadena, along with a multitude of commercial spots.

There are a host of other companies that have jumped on the juice-added bandwagon. Crush International has introduced Apple Crush containing 10 percent juice, now being test marketed in Holland. Last year the company launched reformulated flavors of regular and diet orange, strawberry and grape, each containing 10 percent fruit juice.

Then there's Diet Sunkist Plus from Del Monte, Diet Squirt Plus from Squirt Co., and a new kid on the block – Orangina, from France: an all-natural, juice-added citrus drink. *Beverage Industry* reports that Orangina is poised and ready to grab a larger share of the U.S. soft drink market.

Military Taste Pleasers

"Fruit juice added drinks have really taken off," reports Phil Strom, buyer for Beer/Soda, Navy Services. "Sales in this category have been very brisk and they're steadily increasing every month. Our biggest seller has been the Pepsi Slice line."

Among the military population, diet beverages are especially popular.

Strom feels the popularity of the juice-added drinks is the result of the country's preoccupation with health. "The country is on a health kick," he says, "and the addition of fruit juice and vitamins makes these drinks desirable." Strom notes that the Navy plans to allocate increased shelf space for these products as sales dictate.

The popularity of the juice-added drinks is also evident on the Army and Air Force exchanges. Gary Haynie, Deputy Chief of Public Affairs for the Army/Air Force Exchange Service, points out that the growth rate for carbonated beverages is up by 3 percent, and projects a 5 percent growth for 1987. "Sales of juice drinks are definitely up," according to Haynie. "Juice-enhanced and vitamin-enriched drinks continue to enjoy the greatest growth rate of any of the beverage categories."

The Army/Air Force Exchange Service plans to introduce four new Pepsi Slice products in their overseas markets in the coming year. In addition, it will support six national promotions to be launched this year by PepsiCo. Among them are a "buy one, get one free" coupon promotion; a shopping spree campaign with winners receiving gift certificates; a Honda motorcycle drawing; a free vacation; and a back-to-school promotion.

In the Marine Corps, juice-added drinks are not as successful as elsewhere in the Military. According to Irv Feinberg, Operations Manager, Marine Corps Exchange Service, sales of Coke, Pepsi and Seven Up remain strong, while the juice drinks are slow to catch on.

The Marine Corps exchanges work closely with local beverage distributors on various beverage promotions. Some promotions have involved special prices and premiums which include T-shirts, mugs and tumblers, and are usually offered annually.

Lemon-Lime Leaps Forward

And what about all those other flavored soft drinks?

If you're a fan of lemon-lime flavored beverages, you'll be happy to know that this category enjoyed new success in 1985, despite an off-year from Seven Up, the category leader.

Beverage Industry reports that this category grew from 13.1 percent of the total soft drink market in 1984 to 13.5 percent in 1985. Much of the growth of this segment was due to the growth of the Pepsi Slice line and Coke's Sprite.

Coke, Pepsi, and Seven Up, the leaders in the lemon-lime segment, comprised 89.6 percent of this market slice. For the first time since 1981, Seven Up's share of this growing market dropped below 50 percent.

Scott Sanders, Seven Up Marketing Manager, National Retail Sales, says the company has intensified its military sales promotions. "In 1986, we commenced a strong promotional effort after identifying the military sector as a significant target for promotion."

This Spring, Seven Up will launch across the country a military in-store sweepstakes that promotes both regular and diet Seven Up. Contestants will vie for a child's electric power wheeled jeep.

Count on the Colas

Despite the surge in popularity of juice-enhanced soft drinks, cola drinks remain firmly entrenched in the lead. Those long-time favorites, Coca Cola and Pepsi, remain the giants of the beverage industry. Combined, Pepsi and Coca Cola accounted for over 85 percent of the cola market in 1985.

Coke's total share grew to 38.6 percent of the market in 1985, with Pepsi's share up to 27.4 percent, according to *Beverage Industry*.

It was Pepsi that proved to be the best selling soft drink for 1985, followed by Coca Cola Classic, Coke (new reformulated version), Diet Coke, Dr. Pepper, Seven Up, Sprite, Diet Pepsi, Mountain Dew and Royal Crown Cola.

As you can see, six of the top ten sodas were colas, and historically colas have held the majority of these top spots. But something new is being added to those favorite colas, which might shake up the line-up in the future—they're now cherry flavored. Shelves today are stocking up with a variety of new cherry flavored soft drinks, including Diet Cherry Coke, Cherry Royal Crown, and Pepsi's Cherry Cola Slice.

Cherry cola beverage sales have made an impressive showing in the soft drink industry since their recent debut. In 1985, its first year, Cherry Coke was the eleventh best-selling soft drink, with 110 million cases sold, according to *Beverage Industry*.

Beverage Industry's Research and Statistics Director John C. Maxwell reports that the figure "set an all-time record for a first-year product." He believes the cherry cola products will continue to enhance cola sales.

Is It Possible? . . . Cherry Seven Up

It seems that Seven Up is also a cherry believer. This coming Spring the company will introduce its new Cherry Seven Up.

What makes cherry so special?

"The cherry flavor has been rediscovered," says Scott Sanders. "It used to be one of a number of common extracts that were added to sodas years ago. Even though it was a common additive, it remained a relatively undeveloped flavor. Today we're seeing a rediscovery of multiple flavors, especially cherry."

According to a spokesperson for Coca Cola USA, years ago, when the company conducted tests of various formulas, consumers repeatedly chose cherry. "It was cherry that kept coming out as something that consumers wanted."

The company recently announced it has changed its cherry cola formula. In late December it began distribution of a new Cherry Coke syrup to its bottlers, reportedly with more cherry flavor in it.

On the Army/Air Force exchanges, Cherry Coke was strong overseas, but relatively flat in the U.S., according to Gary Haynie. "We expect moderate growth of Cherry Coke sales in 1987," he notes.

Coca Cola plans various promotions for Cherry Coke in 1987. Among them: point of purchase sales materials, TV ads and magazine advertising in *Exchange & Commissary News* and *Family* Magazine, as well as ALA's *Interservice*.

The Battle of the Bulge

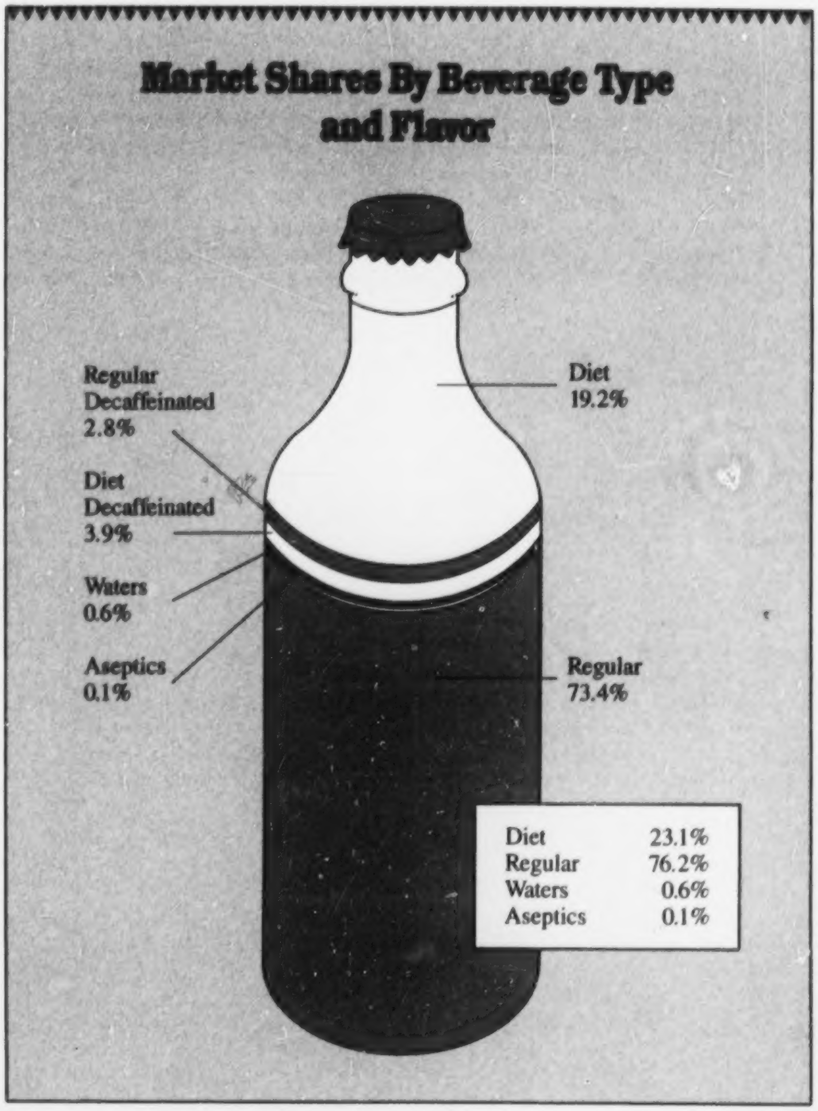
Like the juice-based segment, the diet segment proves to be a top winner in today's beverage sales. According to Beverage Industry, diet soft drinks, which today accounts for over 20 percent of the total market, increased 15.9 percent in 1985.

Irene Malbin, Director of Media Relations, National Soft Drink Association, emphasizes that the growth of the diet market has been a major trend in the beverage industry. The segment has grown steadily since 1970, when it accounted for only 7 percent of the market.

Two years ago, "Beverage Digest," an industry newsletter, noted that diet beverage sales were expanding at a 20 percent annual rate. Many believe that the diet segment has really taken off as a result of the use of 100 percent NutraSweet.

Of 1985's top ten soft drinks, Diet Coke and Diet Pepsi registered the fastest growth. Other companies enjoying success in the diet category include Royal Crown,

Market Shares By Beverage Type and Flavor



How 'Bout A Brew?

America's love affair with beer continues to endure.

Today, two out of three American homes serve beer. According to the Beer Institute's 1986 Almanac, nearly 50 percent of all men and women drink beer. The demand is great—so much so that American breweries annually produce nearly 64 million 12-ounce bottles or cans of beer.

To give you an even better idea of the growth of beer's popularity . . . back in 1963, per capita beer consumption was 1.79 gallons; in 1985, it totaled 23.7 gallons.

The growth rate between the years 1970 and 1980 was significant. The Beer Institute reports that during that decade the brewing industry recorded an average growth rate of over 3 percent annually.

In recent years, things have changed in the brewing industry. With the enactment of tougher liquor laws, the crack-down on drunk driving and the interest in health, beer sales have had their ups and downs. In 1985, domestic beer sales were 1.3 percent less than the record year of 1983. The brewing industry also faces competition these days from imported beers, low-alcohol novelty beverages and wine coolers.

James Greenfield, Director of Administration and Logistics, Stroh International, says there's been a growing interest in wine coolers and alternate fruit drinks. "There's a definite move away from hard liquor," he says, "and a move toward drinking in moderation. People are going after healthier, fruit-based drinks, such as your wine coolers," he notes.

On Marine exchanges, beer sales have declined. Irv Feinberg, Operations Officer, Marine Corps Exchange Service, explains there's been a "deglamorization of alcohol in the Marine Corps." In addition, new state drinking age rules have pushed down beer sales.

Beer sales on Navy exchanges appear to be reflecting these changing trends as well. "Our beer sales were flat in 1986," notes Phil Strom, buyer, Beer/Soda, Navy Services. "There's been a de-emphasis on beer promotion. We've placed restrictions on it in order to combat excessive drinking."

However, despite the obstacles, the beer industry managed to gain in 1986. That's the word from Jerry Steinman, publisher of "Beer Marketer's Insight", an industry newsletter. He reports that, despite the phenomenal growth in popularity of wine coolers, the beer industry was up by 2 percent, with production totalling 3½ million barrels. Anheuser-Busch, Miller, Stroh and Coors were among the principle players.

Steinman also reports that beer imports are zooming—up by 1 million barrels last year. Mexican imported beers, in particular, have made strong gains. Corona shipped nearly 14 million cases in 1986, making it the number 2 import brand in the U.S. Imported beers from Holland, Germany and Canada have also fared well.

Another important player in the beer arena has been the low calorie light beers. When first introduced in the 1970s, sales grew dramatically; they continue to increase. *Fortune* magazine reports that sales of low calorie beers now constitute 36 percent of the total market.

One of the first companies to popularize light beer was Miller Brewing. The company's aggressive marketing for Miller Lite yielded impressive sales. According to one *Fortune* magazine report, Miller sales increased from five million barrels a year in 1971 to over 40 million in 1981, and nearly half of that growth came from Miller Lite.

Jerry Steinman reports that "light beers are growing like crazy. Two of the fastest growing light beers last year were Coors Light and Bud Light."

Even in the Marines, light beer is the preferred choice over regular beer, reflecting the awareness and attention to physical fitness.

While the brewing industry may have faced some tough challenges in recent years, it remains strong. With its products yielding an annual retail value of over $35 million, it is one industry that is firmly entrenched in our nation's economy. ■

Dr. Pepper, Del Monte and A&W.

Among the military population, diet beverages are especially popular. A spokesperson for Coca Cola USA says that a major difference between the civilian market and the military market is the higher proportion of diet drink sales on military bases. Recent figures show that, among civilians, diet drinks accounted for some 25 percent of total beverages sales—compared to 38 percent of commissary beverage sales.

Scott Sanders, Seven Up, points out that Diet Seven Up sales are higher on military exchanges than nationwide. "Sales of diet beverages on Army and Air Force exchanges will be strong this year," says Gary Haynie. "Diet Coke sales, in particular, have increased. Diet Coke and Diet Pepsi sales are up 34 percent and 26 percent, respectively."

Diet cola sales have also strongly increased in the Marine Corps, accounting for nearly 15 percent of all soft drink sales.

Caffeine-Free Beverages On the Way Out?

While caffeine-free colas may have been popular for unjangling nerves, they may be losing their appeal. According to Irene Malbin, the caffeine-free segment (including pepper-type and cola beverages), which had grown to nearly 10 percent of the soft drink market in 1984, dropped to 4.2 percent in 1985. Many beverages industry officials think that the category may be weakening in the marketplace.

Currently, caffeine-free Coke reigns as the number one selling caffeine-free cola in the country. Of all the caffeine-free colas, in 1985 only Coke saw a sales increase—of 6.1 percent. Pepsi, formerly the category leader, was down nearly 5 percent.

Beverage Industry also reports other companies experienced a drop in sales for their caffeine-free offerings: Dr. Pepper (10.7%), Seven Up (30.8%), and Royal Crown (44.8%).

And If You Prefer The Real Thing . . .

"Juice drinks are booming," notes a spokesperson for Tropicana, the world's largest producer of ready to serve orange juice.

Soft drinks have been promoted from the junk food category.

Juice is no longer simply a breakfast drink. It is being purchased and consumed as a soft drink as well, in keeping with the trend toward healthy and "value-added" products. There's been a major push for convenience in this category, according to the Tropicana spokesperson, as people don't want to spend time mixing and preparing frozen juice. In fact, this past year, for the first time since its introduction, ready to serve orange juice surpassed frozen concentrate in gallons consumed.

In response to this growing demand for juices in convenient packages, Tropicana recently introduced its new line of 7 and 10 oz. single-serve glass packaged juices and beverages. Flavors include: Berries & Berries, Orange Cranberry, Apple Cranberry, Grape, Pineapple Grapefruit, Orange and Fruit Punch. These join Tropicana's original offerings of Orange, Grapefruit and Apple juice.

Certainly, lack of choice is not a problem in today's beverage market. The options become greater, and consumers continue to vote through their purchases for those new offerings that catch their fancy. Meanwhile, military exchanges keep close tabs on the fickle public and their ever-changing tastes, to keep up with the hottest trends and supply their customers with the products they seek.

Today, juice-added and diet soft drinks, tomorrow . . . who knows? ■

Chocolate Lovers Rejoice!

If you thought chocolate was reserved for candy, cake and cookies, you haven't checked all the aisles in your nearest grocery. Today there are nearly a half dozen chocolate sodas on the market—and, low and behold, lots of them are diet!

Beverage Industry claims that the niche for chocolate sodas has definitely been established and that the category is likely to continue to hold its own small share.

Alan Canfield's Diet Chocolate Fudge Soda kicked off the diet chocolate soda craze just a few years ago, in 1985, and several other companies are joining in.

Company President Alan Canfield estimates the size of the diet chocolate soda category to be 1.5 percent of the total soft drink market. And Canfield is very pleased.

This past Fall the company introduced its Cherry Chocolate Fudge Soda, which made an impressive debut. *Beverage Industry* reports that Canfield claimed the new soft drink sold more in its first 20 days on the market than the original diet chocolate beverage did during its introduction period.

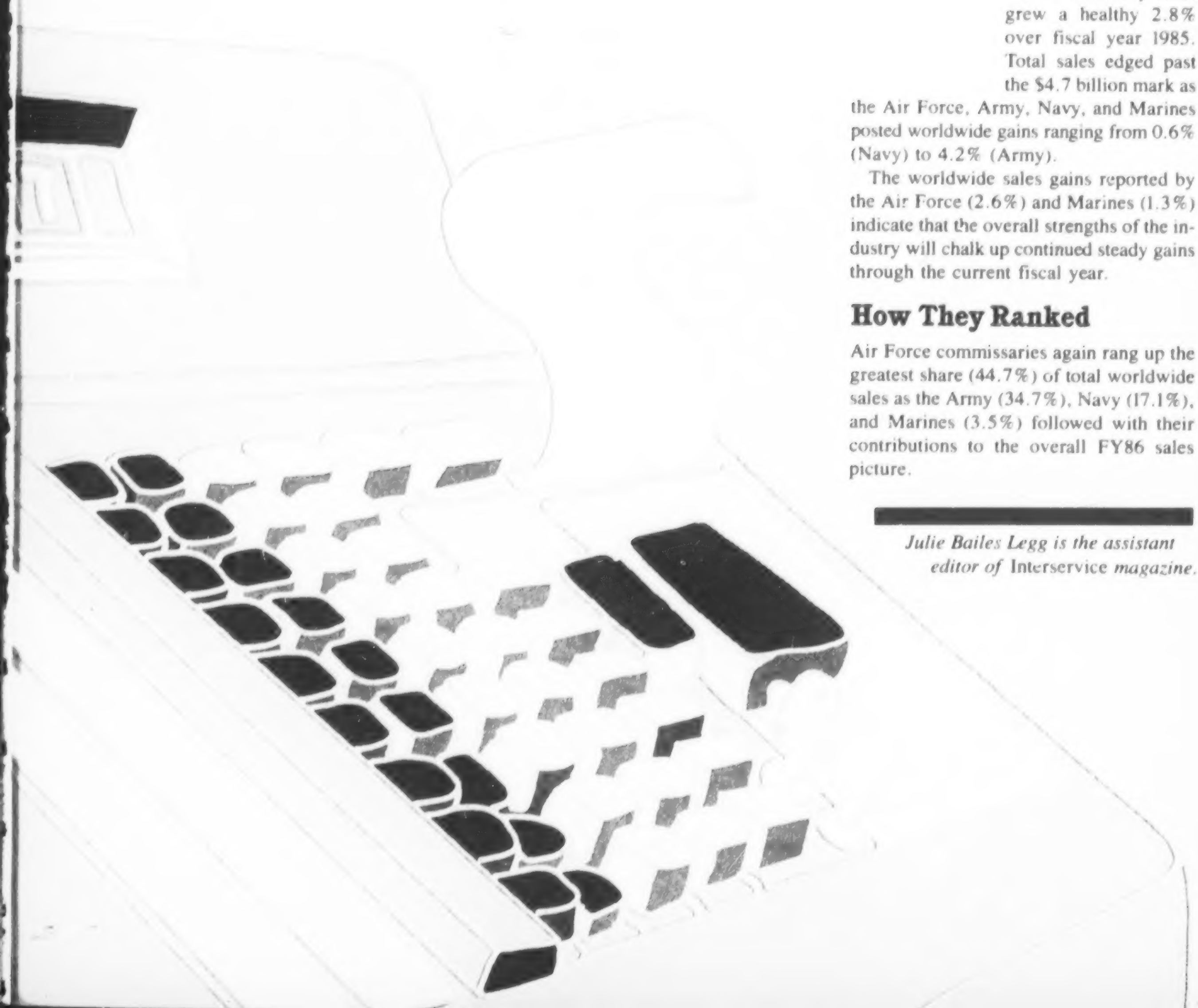
Other companies are sitting up and taking notice.

Famous Amos brands, produced by White Rock, currently markets three 100 percent NutraSweet brands: Famous Amos Diet Chocolate Sundae, Diet Chocolate Cola and Diet Chocolate Rocky Road. These products are available in New England, New York and parts of California, Washington and Oregon.

Beverage Industry also reports that Yoo-hoo Diet Chocolate Fudge Soda sales increased during the last year and a half throughout the company's selected East Coast distribution areas.

And make way for Mrs. Fields Beverages, a division of Mrs. Fields Cookies, a franchise cookie operation of 300 stores in the U.S., Europe and Japan. The company recently introduced Mrs. Fields Diet Chocolate Chip Soda and its non-diet Macadamia Nut Chocolate Chip Soda.

The sodas sound delectable. It's not hard to understand why diet chocolate sodas are becoming popular with so many people watching their weight. Whether it can maintain a profitable niche in the beverage industry remains to be seen . . . chocolate lovers and industry executives are keeping ther fingers crossed. ■



t was a strong showing in fiscal year 1986 as total commissary sales grew a healthy 2.8% over fiscal year 1985. Total sales edged past the $4.7 billion mark as the Air Force, Army, Navy, and Marines posted worldwide gains ranging from 0.6% (Navy) to 4.2% (Army).

The worldwide sales gains reported by the Air Force (2.6%) and Marines (1.3%) indicate that the overall strengths of the industry will chalk up continued steady gains through the current fiscal year.

How They Ranked

Air Force commissaries again rang up the greatest share (44.7%) of total worldwide sales as the Army (34.7%), Navy (17.1%), and Marines (3.5%) followed with their contributions to the overall FY86 sales picture.

Julie Bailes Legg is the assistant editor of Interservice *magazine.*

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Army Commissaries

CONUS store-by-store sales 97
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Coupon redemptions by region 100

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CONUS store-by-store sales 108
Overseas store-by-store sales 112
Coupon redemptions by store 110

Navy Commissaries

CONUS store-by-store sales 113
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Commissary Store Census

This table provides a geographic breakdown of the number of military commissary stores in operation and reporting sales as of Dec. 31, 1986. Excluded are 37 Army (Troop Support Agency) grocery annexes which for reporting purposes are included in the official operating results of main stores.

	Worldwide	CONUS	Overseas
Total DoD	*375*	*231*	*144*
Army (TSA)	137	66	71
Navy	81	58	23
Air Force (AFCOMS)	142	94	48
Marine Corps	15	13	2

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CONUS vs. Overseas

The distribution of worldwide sales between continental U.S. (CONUS) and overseas stores was little changed from FY85. CONUS commissaries accounted for 78.5% (compared to 79.5% in FY85) and overseas stores edging up somewhat for the remaining 21.5% (compared to 20.5% in FY85).

The lion's share of total CONUS sales belonged to the Air Force (46.8%) and Army (31.6%), while the remaining 21.6% was distributed between the Navy (17.6%) and the Marine Corps (4.0%).

Grocery Sales

Worldwide grocery sales totaled over $3.7 billion in FY86 with 78.2% originating in CONUS and 21.8% overseas. Ranked on a worldwide basis, the greatest share of grocery sales were reported by the Air Force (44.5%) and Army (35.7%), followed by the Navy (16.4%) and Marine Corps (3.4%).

Of the CONUS total, Air Force commissaries led with the largest share (46.7%) followed by the Army (32.6%), Navy (16.8%), and Marine Corps (3.9%). The Air Force and Army reversed their position overseas with the Army's share accounting for almost half (47.0%) of all non-CONUS grocery sales. The balance of the overseas sales picture belonged to the Air Force (36.7%), Navy (14.8%), and Marine Corps (1.5%).

Meat Sales

Worldwide sales in the meat department made a healthy increase of 7.5% from FY85, totalling over $730 million. CONUS stores accounted for 80.8% of the total and 19.2% for overseas. Air Force commissaries led the way with the greatest slice (45.7%) of the worldwide meat pie followed by the Army (31.1%), Navy (19.3%), and the Marine Corps (3.9%).

The Air Force and Army stores generated the bulk of all CONUS meat sales (47.8% and 28.0%, respectively) with the Navy (19.8%) and Marine Corps (4.4%) adding their shares to the total. At overseas stores, meat sales made an impressive leap with an increase of 19.8% from last year's totals. The Army's share (44.3%) was slightly greater than that of the Air Force (36.9%). Rounding out the distributed overseas total were sales from the Navy (17.2%) and Marine Corps (1.6%) meat departments.

Produce Sales

Sales generated in the fresh produce category reached $246 million in FY86 accouting for 5.2% of all worldwide commissary sales. The distribution of sales between CONUS and overseas followed closely the pattern reported for the grocery and meat categories with a spread of 76.7% and 23.3%, respectively. Air Force stores rang up the greatest share (44.7%) of total produce sales followed by the Army (29.8%), Navy (21.5%), and Marine Corps (1.9%).

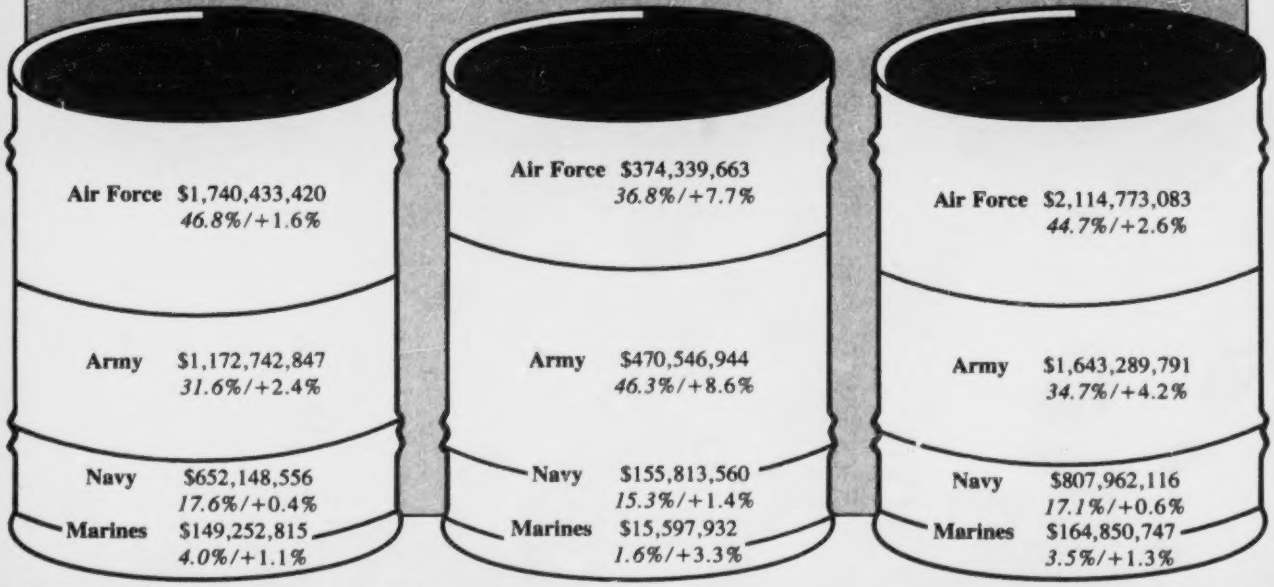
The CONUS produce sales pace put Air Force stores at the top of the category's share ranking (46.4%) with the Army (26.5%), Navy (22.5%), and Marine Corps (4.6%) rounding out the total. Leading the category's sales share lineup overseas was the Army (40.6%) and Air Force (39.1%), followed by the Navy (18.4%) and Marine Corps (1.9%).

What's In Store

The FY86 commissary sales figures are a substantial improvement from the flat sales of FY85. All the services' sales showed a steady increase. With this as encouragement, the industry-military partnership is greatly optimistic about making FY87 even more of a success in the commissaries. ■

All-Service Commissary Total Sales—FY86

	CONUS	Overseas	Worldwide
DoD Totals:	$3,714,577,638	$1,016,298,099	$4,730,875,737
% of W/W Totals:	78.5%	21.5%	100.0%
% Change vs. FY85:	+1.6%	+7.1%	+2.8%



Note: The percentage in italics represents the respective services' sales shares.

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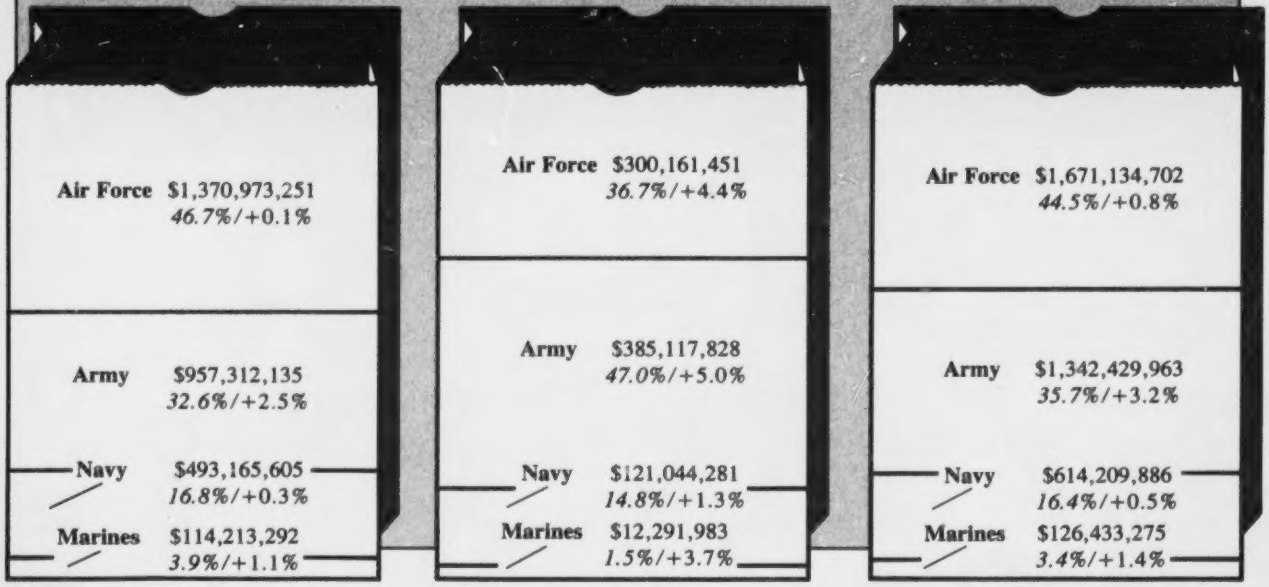
All-Service Commissary Grocery Sales—FY86

	CONUS	Overseas	Worldwide
DoD Totals:	$2,935,664,283	$818,543,543	$3,754,207,826
% of W/W Totals:	78.2%	21.8%	100.0%
% Change vs. FY85:	+0.9%	+4.2%	+1.6%



Note: The percentage in italics represents the respective services' sales shares.

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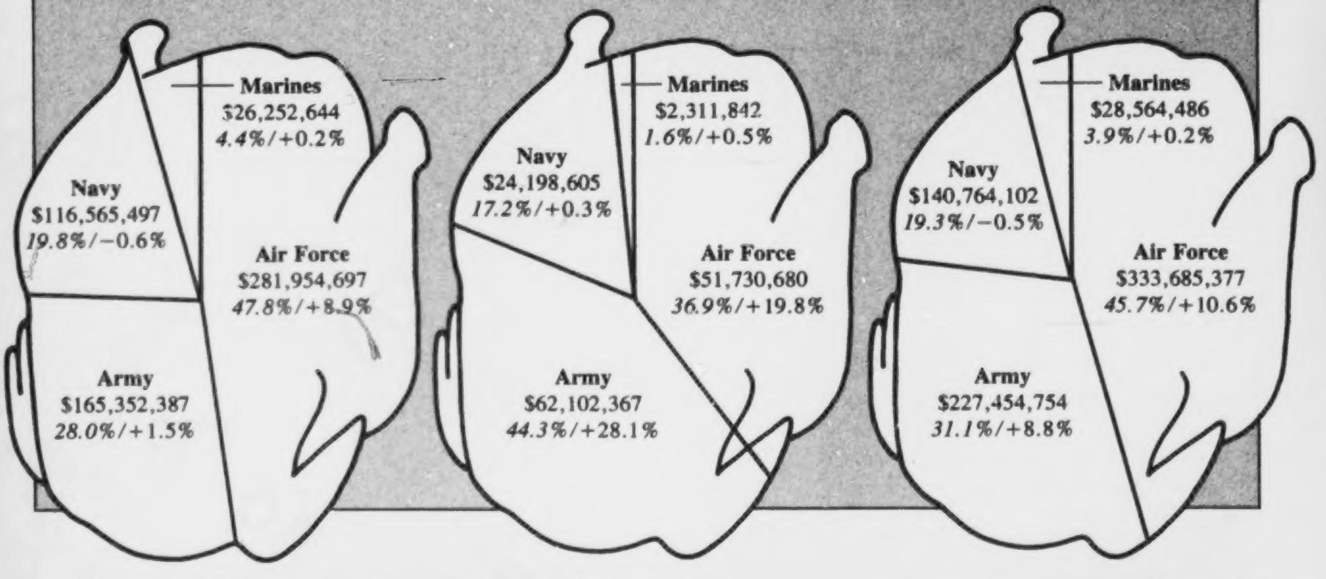
All-Service Commissary Meat Sales—FY86

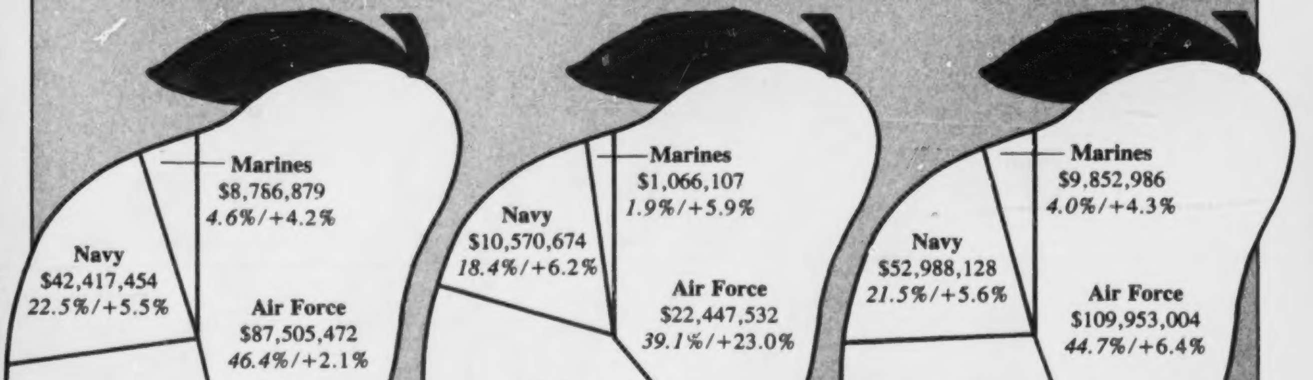
	CONUS	Overseas	Worldwide
DoD Totals:	$590,125,225	$140,343,494	$730,468,719
% of W/W Totals:	80.8%	19.2%	100.0%
% Change vs. FY85:	+4.5%	+19.8%	+7.5%



Note: The percentage in italics represents the respective services' sales shares.

All-Service Commissary Produce Sales—FY86

	CONUS	Overseas	Worldwide
DoD Totals:	$188,788,130	$57,411,062	$246,199,192
% of W/W Totals:	76.7%	23.3%	100.0%
% Change vs. FY85:	+3.8%	+16.9%	+6.8%



Note: The percentage in italics represents the respective services' sales shares.

All-Service Commissary Coupon Redemptions—FY86

CONUS

	Number	% Share CONUS	% Share Worldwide	$ Value	% Share CONUS	% Share Worldwide
Air Force	87,004,298	49.4	46.9	35,456,209	50.8	48.6
Army	53,000,000	30.1	28.5	23,087,761	33.1	31.7
Navy	30,816,530	17.5	16.6	9,645,376	13.8	13.2
Marine Corps	5,418,399	3.0	2.9	1,637,578	2.3	2.2
CONUS Totals	**176,239,227**	**100.0%**	**94.9%**	**$69,826,924**	**100.0%**	**95.7%**

Overseas

	Number	% Share Overseas	% Share Worldwide	$ Value	% Share Overseas	% Share Worldwide
Air Force	5,535,892	56.5	3.0	1,814,299	58.2	2.5
Army	3,500,000	35.7	1.8	1,087,331	34.9	1.5
Navy	469,681	4.8	0.3	131,575	4.2	0.2
Marine Corps	289,913	3.0	0.2	86,260	2.7	0.1
Overseas Totals	**9,795,486**	**100.0%**	**5.3%**	**$3,119,465**	**100.0%**	**4.3%**

Worldwide

	Number		% Share Worldwide	$ Value		% Share Worldwide
Air Force	92,540,190	–	49.6	37,270,508	–	51.1
Army	56,500,000	–	30.4	24,175,092	–	33.1
Navy	31,286,211	–	16.8	9,776,951	–	13.4
Marine Corps	5,708,312	–	3.1	1,723,838	–	2.4
Worldwide Totals	**186,034,713**	–	**100.0%**	**$72,946,389**	–	**100.0%**

Note: Data may not reflect actual geographic distribution of coupon redemptions because official figures reported by region may include stores actually operating overseas but reported in CONUS, and vice-versa.

All-Service Commissary Surcharge Expense Distribution—FY86

	AFCOMS	TSA	Navy	Marine Corps
Total surcharge sales dollars	**$111,000,000**	**$80,771,600**	**$40,417,000**	**$8,169,977**
% surcharge $ distributed to:				
Construction	36.0	42.6	22.7	10.4
Operating & office supplies	23.0	18.7	16.3	18.6
Utilities	13.0	11.4	21.8	16.7
Maintenance & services	8.0	12.9	14.5	13.9
Store Equipment & ADP	20.0	14.4	24.7	18.0
Total	**100.0**	**100.0**	**100.0**	**77.6**[1]

Notes: Details may not add to 100 percent due to rounding. Expense from transportation, linens/uniforms and other like expense items is included in data for maintenance & services. Surcharge sales dollars exclude revenue from other sources (e.g., salvage and cardboard sales and cash discounts from suppliers).

[1] USMC builds a new commissary every 2–3 years. Remaining balance will be held in reserve for commissary construction.

Air Force Commissary Coupon Redemptions—FY86

CONUS

	Number	% Share CONUS	% Share Worldwide	$ Value	% Share CONUS	% Share Worldwide
California	11,954,992	13.7	12.9	4,598,961	13.0	12.3
Delta-Gulf	10,674,180	12.3	11.5	4,802,679	13.6	12.9
North Central	11,578,650	13.3	12.5	4,576,018	12.9	12.3
Northeast	11,710,456	13.5	12.7	4,690,605	13.2	12.6
Northwest	6,022,127	6.9	6.5	2,349,701	6.6	6.3
South Central	14,019,067	16.1	15.2	5,917,504	16.7	15.9
Southeast	10,022,894	11.5	10.8	4,042,909	11.4	10.9
Southwest	11,021,932	12.7	11.9	4,477,832	12.6	12.0
CONUS Totals	**87,004,298**	**100.0%**	**94.0%**	**$35,456,209**	**100.0%**	**95.2%**

Overseas

	Number	% Share Overseas	% Share Worldwide	$ Value	% Share Overseas	% Share Worldwide
Alaska	702,747	12.7	0.8	291,494	16.1	0.8
Andersen AFB, Guam	133,469	2.4	0.2	39,759	2.2	0.1
Ankara, Turkey	13,401	0.2	N	5,278	0.3	N
Aviano AB, Italy	53,557	1.0	0.1	17,700	1.0	0.1
Camp New Amsterdam, NL	57,437	1.0	0.1	15,533	0.9	N
Clark AB, PI	314,064	5.7	0.3	83,862	4.6	0.2
Germany Complex	1,305,102	23.6	1.4	396,791	21.9	1.1
Greece Complex	57,829	1.0	0.1	21,101	1.2	0.1
Hickam AFB, HI	1,095,114	19.8	1.2	385,983	21.3	1.0
Incirlik, Turkey	35,857	0.6	N	11,061	0.6	N
Izmir, Turkey	17,186	0.3	N	5,538	0.3	N
Lajes Field, Azores	42,261	0.8	N	12,948	0.7	N
Misawa, Japan	120,574	2.2	0.1	34,575	1.9	0.1
Okinawa Complex	547,848	9.9	0.6	153,106	8.4	0.4
Osan AB, Korea	116,454	2.1	0.1	41,826	2.3	0.1
San Vito, Italy	22,484	0.4	N	6,904	0.4	N
Spain Complex	110,860	2.0	0.1	37,257	2.1	0.1
UK Complex	641,072	11.6	0.7	209,169	11.4	0.6
Yokota AB, Japan	148,576	2.7	0.2	44,414	2.4	0.1
Overseas Totals	**5,535,892**	**100.0%**	**6.0%**	**$1,814,299**	**100.0%**	**4.8%**
Worldwide Totals	**92,540,190**		**100.0%**	**$37,270,508**		**100.0%**

Note: Overseas stand-alone stores are in italics. All other figures are for store complex areas. Details may not add to totals due to rounding. N = Not significant; less than one-tenth of one percent.

BELIEVE IT OR NOT!

Of the overseas military commissaries for each service, do you know which reported the highest FY86 total store increase? They are:

1. **Army's Ft. Gulick, Panama (+82.6%)**
2. **Air Force's Hellenikon Branch, Greece (+45.1%)**
3. **Navy's Sasebo, Japan (+28.9%)**
4. **Marine Corps' Iwakuni, Japan (+7.7%)**

All-Service Commissary Store Rankings by Total Sq. Ft. of Sales Area

Overseas stores are shown in italics and are ranked separately from CONUS stores. Parent agency or branch of service for each commissary is shown to right of store name and location.

AFCOMS – Air Force Commissary Service
NAVY – Navy Resale System
TSA – U.S. Army Troop Support Agency
USMC – U.S. Marine Corps

Rank	Store/Parent Organization	Total Sq. Ft.
1	Carswell AFB, TX/AFCOMS	50,000
2	Lackland AFB, TX/AFCOMS	43,870
3	Ft. Bragg, NC/TSA	42,134
4	Wright-Patterson AFB, OH/ AFCOMS	39,750
5	McGuire AFB, NJ/AFCOMS	39,444
6	Imperial Beach, CA/Navy	38,600
7	Miramar, CA/Navy	38,600
8	Ft. Hood, TX/TSA	36,551
9	Little Creek, VA/Navy	35,912
10	Ft. Lewis, WA/TSA	35,494
11	Lowry AFB, CO/AFCOMS	35,413
12	Ft. Meade, MD/TSA	35,040
13	Ft. Jackson, SC/TSA	35,040
14	McClellan AFB, CA/AFCOMS	35,000
15	Randolph AFB, TX/AFCOMS	33,628
16	McChord AFB, WA/AFCOMS	32,979
17	Ft. Sill, OK/TSA	32,951
18	Ft. Benning, GA/TSA	32,729
19	San Diego NS, CA/Navy	32,590
20	Ft. Bliss, TX/TSA	32,538
21	Offutt AFB, NE/AFCOMS	32,205
22	Cameron Station, VA/TSA	31,616
1	*Schofield Barracks, HI/TSA*	*31,452*
2	*Elmendorf AFB, AK/AFCOMS*	31,129
23	Hanscom AFB, MA/AFCOMS	31,125
24	Ft. Knox, KY/TSA	31,025
25	Keesler AFB, MS/AFCOMS	30,689
26	Orlando, FL/Navy	30,155
27	March AFB, CA/AFCOMS	29,480
28	Maxwell AFB, AL/AFCOMS	29,400
29	Tyndall AFB, FL/AFCOMS	29,385
3	*Kadena AB, Okinawa/AFCOMS*	*29,225*
30	Barksdale AFB, LA/AFCOMS	29,143
31	Mather AFB, CA/AFCOMS	29,000
32	Tinker AFB, OK/AFCOMS	29,000
33	Andrews AFB, MD/AFCOMS	28,827
34	Little Rock AFB, AR/AFCOMS	28,616
35	Patrick AFB, FL/AFCOMS	28,137
4	*Yongsan, Korea/TSA*	*27,971*
36	Ft. Stewart, GA/TSA	27,953
37	Nellis AFB, NV/AFCOMS	27,593
38	Los Angeles AFB, CA/AFCOMS	27,510
39	Ft. Sam Houston, TX/TSA	26,904
40	Long Beach, CA/Navy	26,800
41	Kirtland AFB, NM/AFCOMS	26,638
42	Langley AFB, VA/AFCOMS	26,532
43	Robins AFB, GA/AFCOMS	26,522
44	Ft. Belvoir, VA/TSA	26,385
45	Travis AFB, CA/AFCOMS	26,350

Continued on page 83

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Air Force Commissary Sales—FY86

California Region/AFCOMS

Store	Store Class	Total Store $ Sales	% of Store Total Grocery	Meat	Produce	Total Sales % Change vs. FY85	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Beale AFB, CA	6	14,301,666	78	18	4	2.5	12,802	93	0.39
Castle AFB, CA	7	18,348,885	79	16	5	1.9	22,760	67	0.49
Edwards AFB, CA	6	12,952,677	78	17	5	1.4	21,200	51	0.35
George AFB, CA	6	14,635,148	78	17	5	7.9	13,943	87	0.39
Indian Springs Aux. Fld., NV	1	497,038	84	12	4	4.5	1,721	24	/a
Los Angeles AFB, CA	5	11,851,904	79	17	4	2.6	27,510	36	0.32
March AFB, CA	8	25,907,622	79	16	5	2.0	29,480	73	0.70
Mather AFB, CA	8	30,347,842	77	17	6	−0.4	29,000	87	0.82
McClellan AFB, CA	8	27,854,860	78	17	5	3.7	35,000	66	0.75
Nellis AFB, NV	8	37,094,958	80	15	5	4.6	27,593	112	1.00
Norton AFB, CA	8	25,678,740	78	17	5	0.8	23,758	90	0.69
Travis AFB, CA	8	32,780,280	77	18	5	5.1	26,350	104	0.88
Vandenberg AFB, CA	7	18,413,980	79	16	5	3.1	23,962	64	0.50
Region Totals		**$270,665,600**	**79%**	**16%**	**5%**	**3.0%**	**295,079**	**$76**	**7.29%**

Delta-Gulf Region/AFCOMS

Store	Store Class	Total Store $ Sales	% of Store Total Grocery	Meat	Produce	Total Sales % Change vs. FY85	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Arnold AFB, TN	3	3,892,149	84	13	3	3.0	8,040	40	0.10
Barksdale AFB, LA	8	37,345,703	78	16	6	1.9	29,143	107	1.01
Blytheville AFB, AR	4	7,679,084	79	17	4	−0.2	10,684	60	0.21
Columbus AFB, MS	5	10,321,010	78	17	5	−1.3	16,500	52	0.28
Eglin AFB, FL	8	30,160,810	78	17	5	−1.5	24,192	104	0.81
England AFB, LA	6	12,132,455	78	17	5	−4.6	12,930	78	0.33
Gunter AFB, AL	5	11,466,008	78	17	5	−6.4	16,160	59	0.31
Hurlburt AFB, FL	5	11,880,125	81	14	5	0.8	11,132	89	0.32
Keesler AFB, MS	8	32,313,610	79	16	5	7.2	30,689	88	0.87
Little Rock AFB, AR	8	28,851,811	79	16	5	−2.0	28,616	84	0.78
Maxwell AFB, AL	7	21,093,599	78	16	6	7.3	29,400	60	0.57
Moody AFB, GA	5	10,806,866	78	17	5	0.6	16,808	54	0.29
Robins AFB, GA	7	18,966,258	80	16	4	3.8	26,522	60	0.51
Tyndall AFB, FL	7	20,704,718	78	17	5	2.2	29,385	59	0.56
Region Totals		**$257,614,206**	**79%**	**16%**	**5%**	**1.4%**	**290,201**	**$74**	**6.94%**

/a Less than 0.1%.
/b Comparison with prior year's data not meaningful.
/c New store opened 3rd qtr FY86.
/d New store opened 4th qtr FY86.
n/a Totals not meaningful for comparison purposes.
* Data not available.

Store classes for Air Force commissaries are based upon total average monthly sales, as follows:

Class 1 Up to $100,000
Class 2 $100,001-$300,000
Class 3 $300,001-$500,000
Class 4 $500,001-$750,000
Class 5 $750,001-$1,000,000
Class 6 $1,000,001-$1,500,000
Class 7 $1,500,001-$2,000,000
Class 8 Over $2,000,000

Notes: All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY86 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data. Details may not add to 100 percent due to rounding.

Continued from page 81

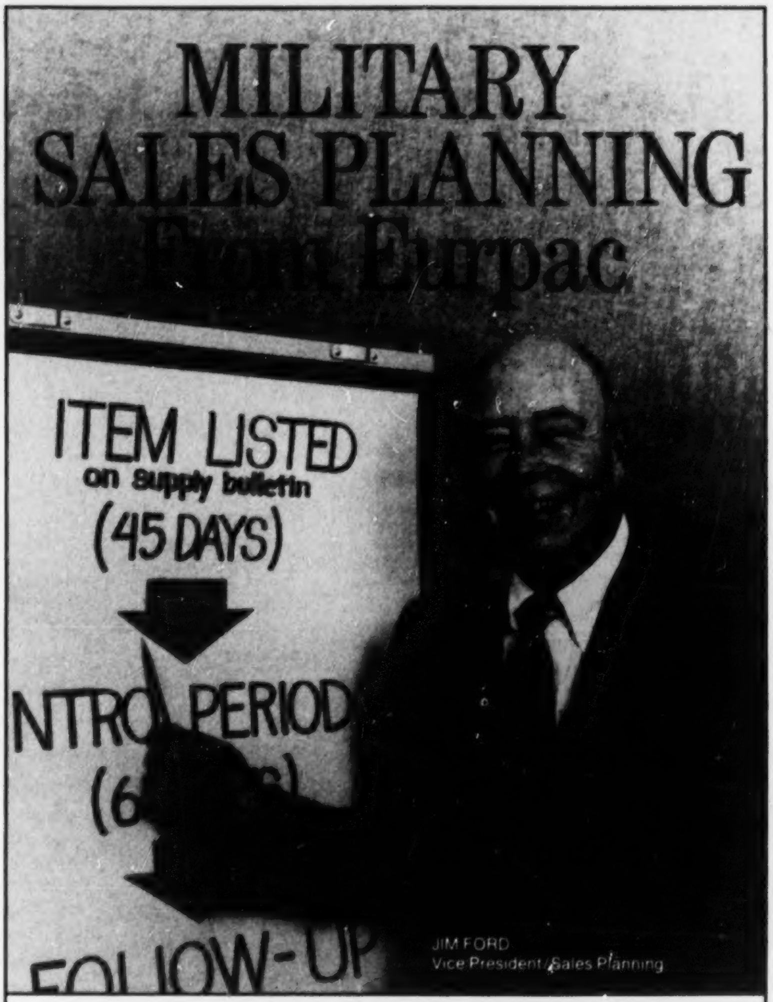
Rank	Store/Parent Organization	Total Sq. Ft.
46	Charleston AFB, SC/AFCOMS	26,000
47	Camp Pendleton, CA/USMC	26,000
48	Walter Reed AMC, DC/TSA	25,858
49	Ft. Campbell, KY/TSA	25,770
50	Charleston NS, SC/Navy	25,727
51	Norfolk, VA/Navy	25,711
52	Pease AFB, NH/AFCOMS	25,506
53	Davis-Monthan AFB, AZ/AFCOMS	25,400
54	MacDill AFB, FL/AFCOMS	25,280
55	Ft. Lee, VA/TSA	25,240
56	Bergstrom AFB, TX/AFCOMS	25,196
57	Luke AFB, AZ/AFCOMS	25,100
58	Sheppard AFB, TX/AFCOMS	25,000
59	El Toro, CA/USMC	25,000
60	Chanute AFB, IL/AFCOMS	24,690
5	*Pearl Harbor, HI/Navy*	*24,641*
6	*Ramstein AB, FRG/AFCOMS*	*24,616*
61	Ft. Monmouth, NJ/TSA	24,562
62	Dover AFB, DE/AFCOMS	24,554
63	Hill AFB, UT/AFCOMS	24,352
64	Eglin AFB, FL/AFCOMS	24,192
65	McConnell AFB, KS/AFCOMS	24,054
66	Scott AFB, IL/AFCOMS	24,000
67	Vandenberg AFB, CA/AFCOMS	23,962
68	Oceana, VA/Navy	23,839
69	Bolling AFB, DC/AFCOMS	23,808
70	Norton AFB, CA/AFCOMS	23,758
71	Ft. Eustis, VA/TSA	23,669
72	Ft. Drum, NY/TSA	23,600
7	*Hanau, FRG/TSA*	*23,580*
73	Ft. Riley, KS/TSA	23,500
74	Holloman AFB, NM/AFCOMS	23,427
75	Presidio of S.F., CA/TSA	23,264
76	Peterson AFB, CO/AFCOMS	23,144
8	*Clark AB, PI/AFCOMS*	*23,128*
77	Pensacola, FL/Navy	23,044
78	Alameda, CA/Navy	22,835

Continued on page 85

BELIEVE IT OR NOT!

$ Sales per sq. ft. averaged $163 at MacDill AFB, FL—best in AFCOMS!

Names of 16 AFCOMS stores begin with the letter "M". Can you name 'em? Overseas, the "As" prevail, with Alconbury, Andersen, Ankara and Aviano holding sway!



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Air Force Commissary Sales—FY86

North Central Region/AFCOMS

Store	Store Class	Total Store $ Sales	% of Store Total Grocery	Meat	Produce	Total Sales % Change vs. FY85	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Calumet AFS, MI	1	319,401	93	3	3	0.4	1,670	16	/a
Chanute AFB, IL	6	13,767,496	79	16	89	2.2	24,690	46	0.37
Ellsworth AFB, SD	6	13,148,391	80	15	5	−0.1	17,358	63	0.35
F.E. Warren AFB, WY	5	10,649,073	80	16	4	1.5	13,963	64	0.29
Forsyth, MT	1	51,468	99	0	1	/c	1,500	3	0.00
Grand Forks AFB, ND	5	9,657,288	79	16	5	3.1	15,250	53	0.26
Grissom AFB, IN	4	8,938,246	80	16	4	2.3	19,833	38	0.24
K.I. Sawyer AFB, MI	4	8,727,147	78	17	5	−0.8	17,428	42	0.23
McConnell AFB, KS	6	15,293,985	80	15	5	−1.3	24,054	53	0.41
Minot AFB, ND	5	9,388,433	79	16	5	1.2	12,872	61	0.25
Offutt AFB, NE	8	31,219,629	80	15	5	−1.5	32,205	81	0.84
Port Austin AFS, MI	1	292,483	93	5	2	−1.4	1,490	16	0.01
Scott AFB, IL	8	26,711,374	77	17	6	5.2	24,000	93	0.72
Whiteman AFB, MO	5	10,396,543	81	15	4	2.7	18,313	47	0.28
Wright-Patterson AFB, OH	8	41,062,331	79	16	5	0.5	39,750	86	1.11
Wurtsmith AFB, MI	4	8,140,615	80	16	4	1.4	17,133	40	0.22
Region Totals		**$207,763,903**	**82%**	**13%**	**10%**	**1.2%**	**281,509**	**$62**	**5.58%**

/a Less than 0.1%.
/b Comparison with prior year's data not meaningful.
/c New store opened 3rd qtr FY86.
/d New store opened 4th qtr FY86.
n/a Totals not meaningful for comparison purposes.
* Data not available.

Store classes for Air Force commissaries are based upon total average monthly sales, as follows:

Class 1	Up to $100,000	Class 3	$300,001-$500,000	Class 5	$750,001-$1,000,000	Class 7	$1,500,001-$2,000,000
Class 2	$100,001-$300,000	Class 4	$500,001-$750,000	Class 6	$1,000,001-$1,500,000	Class 8	Over $2,000,000

Notes: All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY86 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data. Details may not add to 100 percent due to rounding.

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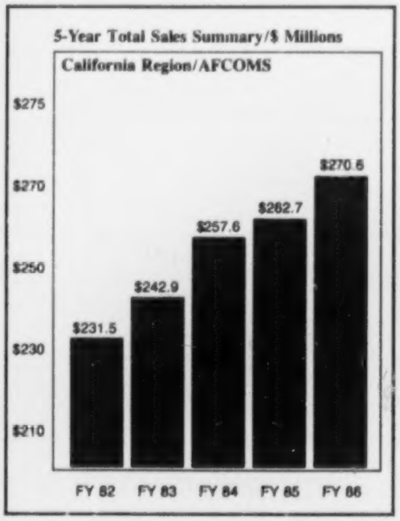

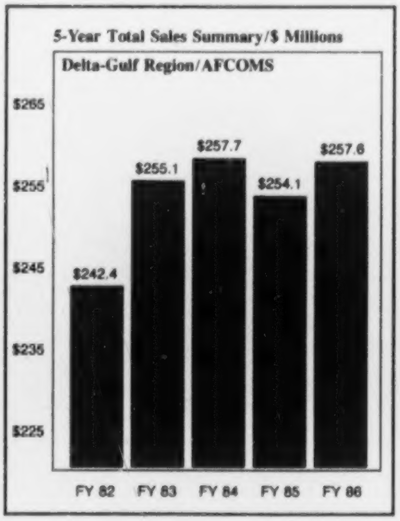

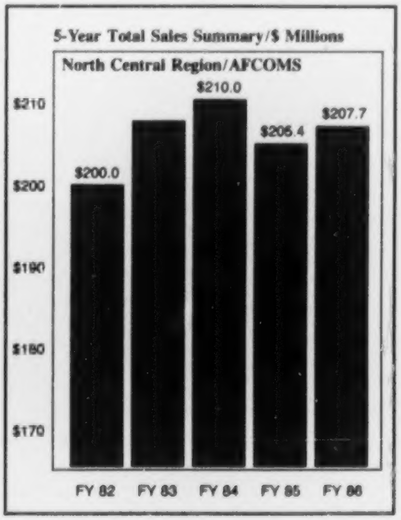

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Rank	Store/Parent Organization	Total Sq. Ft.
79	Castle AFB, CA/AFCOMS	22,760
80	Ft. Gordon, GA/TSA	22,712
81	Memphis, TN/Navy	22,468
82	Ft. Gillem, GA/TSA	22,156
9	*Hickam AFB, HI/AFCOMS*	*22,144*
83	Bangor, WA/Navy	22,000
84	Williams AFB, AZ/AFCOMS	21,986
85	Ft. Carson, CO/TSA	21,864
86	New London, CT/Navy	21,685
87	Portsmouth, VA/Navy	21,346
88	Redstone Arsenal, AL/TSA	21,279
89	Edwards AFB, CA/AFCOMS	21,200
10	*Misawa AB, Japan/AFCOMS*	*21,151*
90	Homestead AFB, FL/AFCOMS	20,962
91	Granite City AD, IL/TSA	20,789
11	*Osan AB, Korea/AFCOMS*	*20,250*
12	*Giessen, FRG/TSA*	*20,123*
92	Ft. Huachuca, AZ/TSA	20,087
93	Plattsburgh AFB, NY/AFCOMS	19,993
94	Grissom AFB, IN/AFCOMS	19,833
95	Jacksonville, FL/Navy	19,728
96	Ft. Polk, LA/TSA	19,642
97	Novato (Hamilton), CA/Navy	19,500
98	Quantico, VA/USMC	19,500
99	Fairchild AFB, WA/AFCOMS	19,311
13	*Frankfurt, FRG/TSA*	*19,291*
14	*Bremerhaven, FRG/TSA*	*19,152*
100	Ft. Myer, VA/TSA	19,050
15	*Heidelberg, FRG/TSA*	*18,910*
101	Great Lakes, IN/Navy	18,700
102	Cherry Point, NC/USMC	18,655
103	Ft. Leonard Wood, MO/TSA	18,512
104	Ft. Leavenworth, KS/TSA	18,437
105	Whiteman AFB, MO/AFCOMS	18,313
106	Moffett Field, CA/Navy	18,280
107	Cannon AFB, NM/AFCOMS	18,240
108	Ft. Ord, CA/TSA	18,190
16	*Ft. Buchanan, Puerto Rico/TSA*	*18,084*
109	Tarawa Terrace, NC/USMC	18,053
110	Dyess AFB, TX/AFCOMS	18,000
111	Philadelphia, PA/Navy	17,502
112	Hunter AAF, GA/TSA	17,500
113	K.I. Sawyer AFB, MI/AFCOMS	17,428
114	Ellsworth AFB, SD/AFCOMS	17,358
17	*Berlin (Free Zone), FRG/TSA*	*17,352*
18	*Vogelweh, FRG/AFCOMS*	*17,349*
115	Ft. Rucker, AL/TSA	17,200
116	Wurtsmith AFB, MI/AFCOMS	17,133
117	Seymour Johnson AFB, NC/AFCOMS	17,035
118	Griffiss AFB, NY/AFCOMS	17,000
119	Malmstrom AFB, MT/AFCOMS	17,000
120	Kings Bay, GA/Navy	17,000
121	Lemoore, CA/Navy	16,870
122	Mare Island, CA/Navy	16,840
123	Moody AFB, GA/AFCOMS	16,808
19	*Sagamihara, Japan/TSA*	*16,792*
124	Port Hueneme, CA/Navy	16,700
20	*Baumholder, FRG/TSA*	*16,635*
125	Hadnot Point, NC/USMC	16,627
126	Columbus AFB, MS/AFCOMS	16,500
127	New Cumberland, PA/TSA	16,490
128	Ft. Ben Harrrison, IN/TSA	16,336
129	USAF Academy, CO/AFCOMS	16,238
130	Reese AFB, TX/AFCOMS	16,208
131	Gunter AFB, AL/AFCOMS	16,160
21	*Butler, Okinawa/AFCOMS*	*16,100*
22	*Torrejon AB, Spain/AFCOMS*	*15,893*
23	*Ft. Richardson, AK/TSA*	*15,713*
132	Kelly AFB, TX/AFCOMS	15,710
24	*Fuerth, FRG/TSA*	*15,378*
25	*Darmstadt, FRG/TSA*	*15,341*
26	*Guam/Navy*	*15,303*
27	*Rhein Main AB, FRG/AFCOMS*	*15,300*
28	*Andersen AFB, Guam/AFCOMS*	*15,300*

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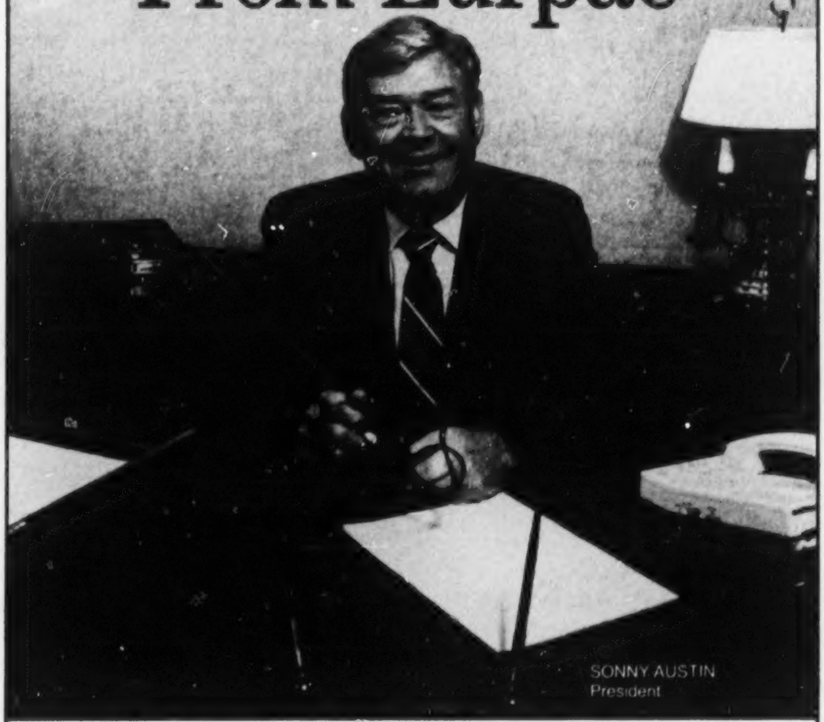
MILITARY SALES RESULTS From Eurpac



SONNY AUSTIN
President

Eurpac will increase your Market Share through our professionally trained Sales Force. As a results-oriented group, we understand the importance of aggressive follow-through.

Whether it is setting objectives, designing promotions, presenting items and concepts in Commissaries, Exchanges or Ships Afloat, Eurpac is the team that succeeds.

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Eurpac — Another Word For Results

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SERVICE COMPANY
P.O. BOX 1787
170 MASON STREET, GREENWICH, CT 06836-1787
(203) 622-8400

Air Force Commissary Sales—FY86

Northeast Region/AFCOMS

Store	Store Class	Total Store $ Sales	% of Store Total Grocery	Meat	Produce	Total Sales % Change vs. FY85	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Andrews AFB, MD	8	37,596,460	77	17	6	3.3	28,827	109	1.01
Bolling AFB, DC	7	20,453,432	76	18	6	−0.4	23,808	72	0.55
Dover AFB, DE	7	18,066,847	79	17	4	1.1	24,554	61	0.49
Griffiss AFB, NY	6	15,043,263	80	15	5	−1.8	17,000	74	0.40
Hanscom AFB, MA	7	18,670,906	79	16	5	−3.2	31,125	50	0.50
Langley AFB, VA	8	35,945,829	77	17	6	0.4	26,532	113	0.97
Loring AFB, ME	4	8,376,566	80	14	6	3.9	12,404	56	0.23
McGuire AFB, NJ	8	46,650,582	79	17	4	6.8	39,444	99	1.26
Pease AFB, NH	7	19,259,935	82	14	4	0.1	25,506	63	0.52
Plattsburgh AFB, NY	5	10,965,179	81	14	5	3.4	19,993	46	0.30
Region Totals		**$231,028,999**	**79%**	**16%**	**5%**	**1.8%**	**249,193**	**$77**	**6.22%**

Northwest Region/AFCOMS

Store	Store Class	Total Store $ Sales	% of Store Total Grocery	Meat	Produce	Total Sales % Change vs. FY85	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Fairchild AFB, WA	7	22,246,035	81	14	5	3.9	19,311	96	0.60
Havre, MT	1	16,561	82	14	4	/d	1,500	1	/a
Hill AFB, UT	7	21,356,894	79	15	6	−0.3	24,352	73	0.57
Makah AFS, WA	1	340,634	83	13	4	7.4	1,478	19	/a
Malmstrom AFB, MT	5	11,556,968	81	15	4	−0.2	17,000	57	0.31
McChord AFB, WA	8	45,384,711	78	16	6	3.2	32,979	115	1.22
Mt. Home AFB, ID	5	11,261,147	79	16	5	−4.6	15,094	62	0.30
Powell, WY	1	298,388	83	13	4	/c	3,262	8	/a
Region Totals		**$112,461,338**	**81%**	**15%**	**5%**	**1.8%**	**114,976**	**$82**	**3.03%**

/a Less than 0.1%.
/b Comparison with prior year's data not meaningful.
/c New store opened 3rd qtr FY86.
/d New store opened 4th qtr FY86.
n/a Totals not meaningful for comparison purposes.
* Data not available.

Store classes for Air Force commissaries are based upon total average monthly sales, as follows:

Class 1	Up to $100,000
Class 2	$100,001-$300,000
Class 3	$300,001-$500,000
Class 4	$500,001-$750,000
Class 5	$750,001-$1,000,000
Class 6	$1,000,001-$1,500,000
Class 7	$1,500,001-$2,000,000
Class 8	Over $2,000,000

Notes: All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY86 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data. Details may not add to 100 percent due to rounding.

BELIEVE IT OR NOT!

Worldwide military commissary sales (unadjusted) have shown an increase in every fiscal year for the past four years.

Air Force Commissary Sales—FY86

South Central Region/AFCOMS

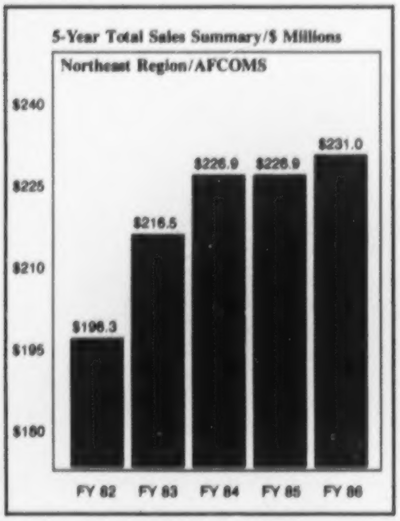
Store	Store Class	Total Store $ Sales	% of Store Total Grocery	% of Store Total Meat	% of Store Total Produce	Total Sales % Change vs. FY85	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Altus AFB, OK	5	9,584,758	80	14	6	4.2	9,952	80	0.26
Bergstrom AFB, TX	8	31,814,988	79	16	5	−1.6	25,196	105	0.86
Brooks AFB, TX	4	6,497,438	80	16	4	−5.9	9,240	59	0.17
Carswell AFB, TX	8	47,423,528	79	16	5	5.6	50,000	79	1.28
Dyess AFB, TX	6	16,434,650	79	16	5	6.2	18,000	76	0.44
Goodfellow AFB, TX	4	8,157,788	80	15	5	4.7	11,440	59	0.22
Kelly AFB, TX	4	8,253,559	79	17	4	−20.5	15,710	44	0.22
Lackland AFB, TX	8	40,757,203	78	17	5	10.5	43,870	77	1.10
Laughlin AFB, TX	3	5,204,353	80	15	5	0.5	12,220	35	0.14
Randolph AFB, TX	8	38,859,875	77	17	6	0.1	33,628	96	1.05
Sheppard AFB, TX	7	18,931,130	78	16	6	1.6	25,000	63	0.51
Tinker AFB, OK	8	34,998,276	80	15	5	1.4	29,000	101	0.94
Vance AFB, OK	3	4,767,964	78	17	5	−1.4	9,570	42	0.13
Region Totals		**$271,685,510**	**79%**	**16%**	**5%**	**2.5%**	**292,826**	**$77**	**7.31%**

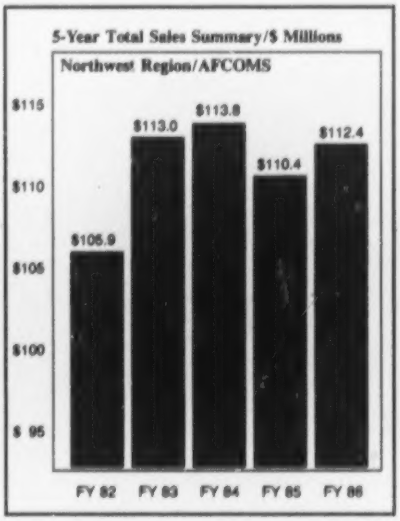
/a Less than 0.1%.
/b Comparison with prior year's data *not* meaningful.
/c New store opened 3rd qtr FY86.
/d New store opened 4th qtr FY86.
n/a Totals not meaningful for comparison purposes.
* Data not available.

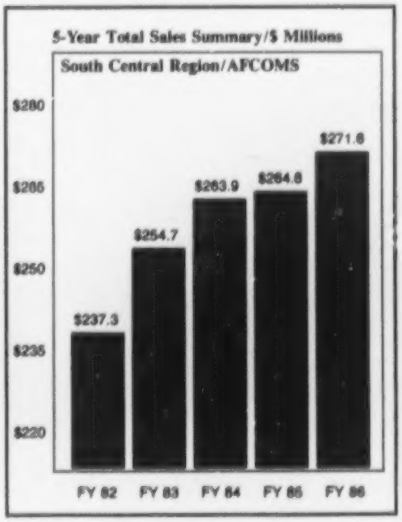
Store classes for Air Force commissaries are based upon total average monthly sales, as follows:

Class 1 Up to $100,000	Class 3 $300,001-$500,000	Class 5 $750,001-$1,000,000	Class 7 $1,500,001-$2,000,000
Class 2 $100,001-$300,000	Class 4 $500,001-$750,000	Class 6 $1,000,001-$1,500,000	Class 8 Over $2,000,000

Notes: All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY86 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data. Details may not add to 100 percent due to rounding.


5-Year Total Sales Summary/$ Millions


5-Year Total Sales Summary/$ Millions


5-Year Total Sales Summary/$ Millions

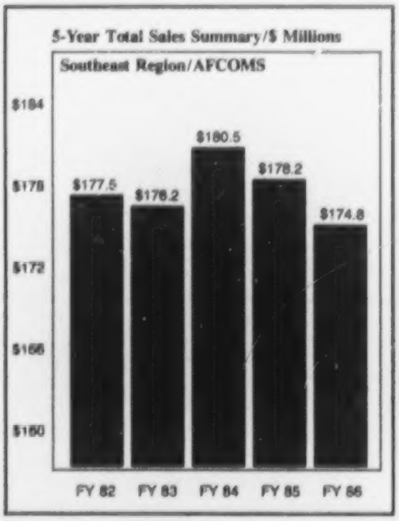
Air Force Commissary Sales—FY86

Southeast Region/AFCOMS

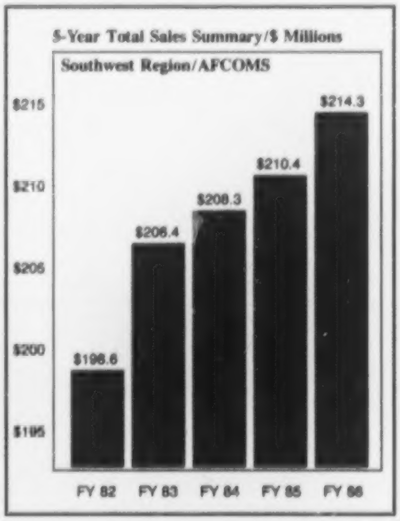
Store	Store Class	Total Store $ Sales	% of Store Total Grocery	 Meat	 Produce	Total Sales % Change vs. FY85	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Avon Park Range, FL	1	1,083,272	83	14	3	9.4	3,012	30	/a
Charleston AFB, SC	7	23,979,419	78	17	5	−7.5	26,000	77	0.65
Fort Fisher AFS, NC	1	724,378	89	9	2	−0.6	3,120	19	/a
Homestead AFB, FL	8	25,175,457	79	17	4	−1.3	20,962	100	0.68
MacDill AFB, FL	8	49,518,802	81	15	4	−2.7	25,280	163	1.33
Myrtle Beach AFB, SC	5	10,569,945	78	17	5	0.9	11,272	78	0.28
Patrick AFB, FL	8	33,227,510	78	17	5	1.2	28,137	98	0.89
Seymour Johnson AFB, NC	6	14,741,626	78	18	4	−3.2	17,035	72	0.40
Shaw AFB, SC	6	15,856,227	77	18	5	0.4	15,000	88	0.43
Region Totals		**$174,876,636**	**80%**	**16%**	**4%**	**−1.9%**	**149,818**	**$97**	**4.71%**

Southwest Region/AFCOMS

Store	Store Class	Total Store $ Sales	% of Store Total Grocery	 Meat	 Produce	Total Sales % Change vs. FY85	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Cannon AFB, NM	4	7,775,550	79	16	5	−6.3	18,240	36	0.21
Davis-Monthan AFB, AZ	8	31,446,826	79	15	6	3.1	25,400	103	0.85
Gila Bend AF Aux.Fld.,AZ	1	429,364	82	14	4	24.7	2,663	13	/a
Holbrook AFB, AZ	1	234,823	86	13	1	25.1	592	33	/a
Holloman AFB, NM	6	13,448,655	80	15	5	4.7	23,427	48	0.36
Kirtland AFB, NM	8	30,441,986	81	15	4	2.7	26,638	95	0.82
Lowry AFB, CO	8	34,682,586	77	17	6	2.9	35,413	82	0.93
Luke AFB, AZ	8	27,733,652	80	15	5	0.2	25,100	92	0.75
Peterson AFB, CO	8	27,492,382	77	17	6	5.0	23,144	99	0.74
Reese AFB, TX	4	6,813,481	80	15	5	−11.1	16,208	35	0.18
USAF Academy, CO	6	16,012,673	77	16	7	−1.3	16,238	82	0.43
Williams AFB, AZ	6	17,825,250	80	15	5	2.4	21,986	68	0.48
Region Totals		**$214,337,228**	**80%**	**15%**	**5%**	**1.8%**	**235,049**	**$76**	**5.77%**
CONUS AFCOMS Totals		**$1,740,433,420**	**79%**	**16%**	**5%**	**1.6%**	**1,908,651**	**$76**	**46.85%**



5-Year Total Sales Summary/$ Millions



5-Year Total Sales Summary/$ Millions

Air Force Commissary Sales—FY86 OVERSEAS

Alaska Stores/AFCOMS

Store	Store Class	Total Store $ Sales	% of Store Total			Total Sales % Change vs. FY85	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
			Grocery	Meat	Produce				
Eielson AFB, AK	4	8,500,253	79	15	6	1.8	9,130	78	0.84
Elmendorf AFB, AK	8	24,952,364	76	18	6	−6.0	31,129	67	2.46
Totals		**$33,452,617**	**78%**	**17%**	**6%**	**−4.0%**	**40,259**	**$69**	**3.29%**

Central European Complex/AFCOMS

Store	Store Class	Total Store $ Sales	% of Store Total			Total Sales % Change vs. FY85	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
			Grocery	Meat	Produce				
Bitburg AB, FRG	4	8,470,042	81	13	6	8.1	13,877	51	0.83
Florennes, Belgium	1	259,110	*	*	*	/c	1,914	11	/a
Hahn AB, FRG	5	9,519,460	84	11	5	20.7	10,312	77	0.94
Hessisch-Oldendorf, FRG	1	1,132,494	95	0	5	9.6	3,173	30	0.11
Oslo, Norway	1	1,004,243	80	13	7	22.8	2,571	33	0.10
Preum AS, FRG	1	442,232	100	0	0	5.3	4,409	8	/a
Ramstein AB, FRG	7	23,697,304	79	14	7	12.8	24,616	80	2.33
Rhein Main AB, FRG	5	10,842,206	79	15	6	13.2	15,300	59	1.07
Sembach AB, FRG	3	5,113,245	79	15	6	13.6	8,352	51	0.50
Spangdahlem AB, FRG	4	6,408,349	82	13	5	20.9	8,796	61	0.63
Trier HA, FRG	1	136,015	100	0	0	−2.1	3,348	3	/a
Vogelweh, FRG	6	15,998,898	79	15	6	14.6	17,349	77	1.57
Complex Totals		**$83,023,598**	**85%**	**10%**	**5%**	**14.6%**	**114,017**	**$61**	**8.17%**

Greece Complex/AFCOMS

Store	Store Class	Total Store $ Sales	% of Store Total			Total Sales % Change vs. FY85	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
			Grocery	Meat	Produce				
Hellenikon AB	2	2,762,907	88	8	4	−18.6	8,395	27	0.27
Hellenikon Branch	2	2,457,833	94	1	5	45.1	2,653	77	0.24
Iraklion AS (Crete)	2	1,680,524	86	8	6	−3.3	4,206	33	0.17
Complex Totals		**$6,901,264**	**89%**	**6%**	**5%**	**7.8%**	**15,254**	**$38**	**0.68%**

/a Less than 0.1%.
/b Comparison with prior year's data not meaningful.
/c New store opened 3rd qtr FY86.
/d New store opened 4th qtr FY86.
n/a Totals not meaningful for comparison purposes.
* Data not available.

Store classes for Air Force commissaries are based upon total average monthly sales, as follows:

Class 1	Up to $100,000	Class 3	$300,001-$500,000	Class 5	$750,001-$1,000,000	Class 7	$1,500,001-$2,000,000
Class 2	$100,001-$300,000	Class 4	$500,001-$750,000	Class 6	$1,000,001-$1,500,000	Class 8	Over $2,000,000

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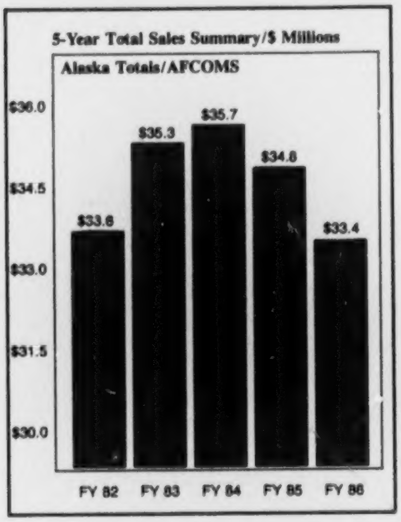
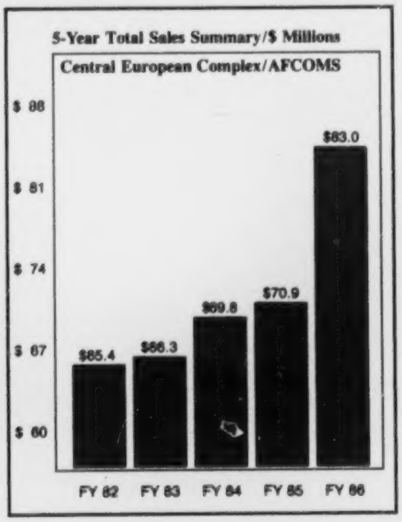
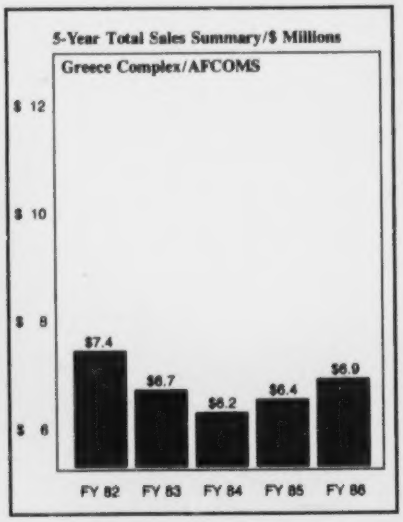
Air Force Commissary Sales—FY86







Spain Complex/AFCOMS

Store	Store Class	Total Store $ Sales	% of Store Total Grocery	% of Store Total Meat	% of Store Total Produce	Total Sales % Change vs. FY85	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Royal Oaks HA	1	602,105	98	0	2	6.1	1,315	38	/a
Torrejon AB	4	8,613,301	84	11	5	11.3	15,893	45	0.85
Zaragoza	2	2,561,953	84	12	4	14.1	5,384	40	0.25
Complex Totals		**$11,777,359**	**89%**	**8%**	**4%**	**12.0%**	**22,592**	**$43**	**1.16%**

Okinawa Complex/AFCOMS

Store	Store Class	Total Store $ Sales	% of Store Total Grocery	% of Store Total Meat	% of Store Total Produce	Total Sales % Change vs. FY85	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Butler	6	13,424,582	82	12	6	9.7	16,100	69	1.32
Kadena AB	8	25,374,942	79	13	8	11.6	29,225	72	2.50
Kinser	3	4,295,777	100	0	0	−2.9	0	0	0.42
Makiminato	2	2,854,370	81	14	5	−25.9	8,412	28	0.28
Complex Totals		**$45,949,671**	**86%**	**10%**	**5%**	**7.4%**	**53,737**	**$71**	**4.52%**

/a Less than 0.1%.
/b Comparison with prior year's data not meaningful.
/c New store opened 3rd qtr FY86.
/d New store opened 4th qtr FY86.
n/a Totals not meaningful for comparison purposes.
• Data not available.

Store classes for Air Force commissaries are based upon total average monthly sales, as follows:
Class 1 Up to $100,000
Class 2 $100,001-$300,000
Class 3 $300,001-$500,000
Class 4 $500,001-$750,000
Class 5 $750,001-$1,000,000
Class 6 $1,000,001-$1,500,000
Class 7 $1,500,001-$2,000,000
Class 8 Over $2,000,000

Notes: All sales data are preliminary and unaudited, and exclude the 3% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY86 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data. Details may not add to 100 percent due to rounding.

Air Force Commissary Sales—FY86

United Kingdom Complex/AFCOMS

Store	Store Class	Total Store $ Sales	% of Store Total			Total Sales % Change vs. FY85	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
			Grocery	Meat	Produce				
RAF Alconbury	4	6,338,774	79	15	6	12.8	10,000	53	0.62
RAF Bentwaters	4	8,379,879	79	15	6	7.6	12,979	54	0.82
RAF Burtonwood	1	174,631	100	0	0	/b	1,127	13	/a
RAF Chicksands	2	2,512,923	81	14	5	10.0	4,725	44	0.25
RAF Fairford	2	2,723,203	79	16	5	10.6	5,421	42	0.27
RAF Greenham Common	2	3,236,672	81	14	5	13.8	7,213	37	0.32
RAF Lakenheath	6	14,547,616	80	15	5	8.5	13,320	91	1.43
RAF Menwith Hill	2	1,645,527	76	18	6	9.5	2,926	47	0.16
RAF Sculthorpe	1	220,466	100	0	0	33.6	3,148	6	/a
RAF Upper Heyford	5	9,162,721	79	17	4	8.8	12,624	60	0.90
RAF Wethersfield	1	1,013,577	78	17	5	13.5	3,945	21	0.10
Complex Totals		**$49,955,989**	**83%**	**13%**	**4%**	**10.0%**	**77,428**	**$54**	**4.92%**

/a Less than 0.1%.
/b Comparison with prior year's data not meaningful.
/c New store opened 3rd qtr FY86.
/d New store opened 4th qtr FY86.
n/a Totals not meaningful for comparison purposes.
* Data not available.

Store classes for Air Force commissaries are based upon total average monthly sales, as follows:

Class 1 Up to $100,000	Class 3 $300,001-$500,000	Class 5 $750,001-$1,000,000	Class 7 $1,500,001-$2,000,000
Class 2 $100,001-$300,000	Class 4 $500,001-$750,000	Class 6 $1,000,001-$1,500,000	Class 8 Over $2,000,000

Notes: All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY86 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data. Details may not add to 100 percent due to rounding.

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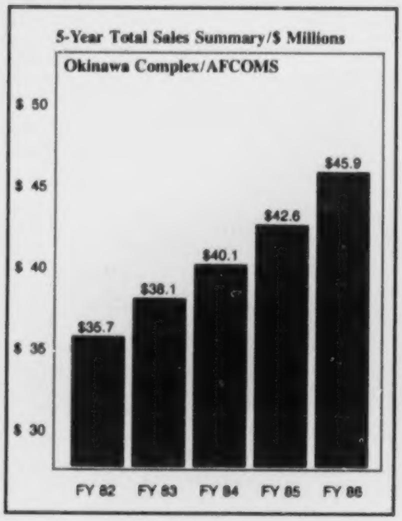
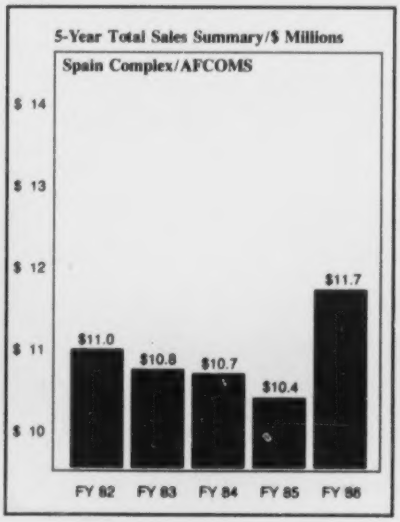
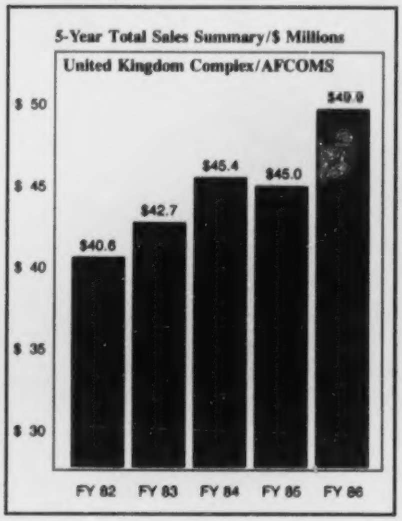

5-Year Total Sales Summary/$ Millions
Okinawa Complex/AFCOMS


5-Year Total Sales Summary/$ Millions
Spain Complex/AFCOMS


5-Year Total Sales Summary/$ Millions
United Kingdom Complex/AFCOMS

Air Force Commissary Sales—FY86

Non-Complex Stores Overseas/AFCOMS

Store	Store Class	Total Store $ Sales	% of Store Total			Total Sales % Change vs. FY85	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
			Grocery	Meat	Produce				
Andersen AFB, Guam	6	16,224,552	79	14	7	10.7	15,300	88	1.60
Ankara, Turkey	2	2,144,029	88	8	4	12.4	10,856	16	0.21
Aviano AB, Italy	3	3,998,109	83	11	6	16.6	6,840	49	0.39
Camp New Amsterdam, NL	3	3,787,943	81	14	5	14.6	10,579	30	0.37
Clark AB, PI	8	28,241,671	82	11	7	1.0	23,128	102	2.78
Comiso AS, Italy	1	41,493	100	0	0	/d	0	0	/a
Hickam AFB, HI	8	31,150,185	77	16	7	2.6	22,144	117	3.07
Incirlik, Turkey	3	4,870,671	86	9	5	1.4	8,192	50	0.48
Izmir, Turkey	2	2,315,037	88	9	3	9.2	5,220	37	0.23
Lajes Field, Azores	3	4,894,012	85	9	6	11.0	6,354	64	0.48
Misawa AB, Japan	5	10,067,803	79	14	7	18.3	21,151	40	0.99
Osan AB, Korea	7	18,480,099	76	18	6	−0.6	20,250	76	1.82
San Vito AS, Italy	2	2,898,039	85	9	6	11.1	6,270	39	0.29
Yokota AB, Japan	6	14,165,522	80	15	5	3.0	14,490	81	1.39
Non-Complex Stores' Totals		**$143,279,165**	**n/a**	**n/a**	**n/a**	**n/a**	**170,774**	**$70**	**14.10%**
Overseas AFCOMS Totals		**$374,339,663**	**86%**	**14%**	**6%**	**8.3%**	**494,061**	**$62**	**36.84%**
Worldwide AFCOMS Totals		**$2,114,773,083**	**79%**	**16%**	**5%**	**2.8%**	**2,402,712**	**$73**	**44.70%**

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Rank	Store/Parent Organization	Total Sq. Ft.
133	Ft. McClellan, AL/TSA	15,286
134	Grand Forks AFB, ND/ AFCOMS	15,250
29	*Karlsruhe, FRG/TSA*	*15,197*
135	Mt. Home AFB, ID/AFCOMS	15,094
136	Shaw AFB, SC/AFCOMS	15,000
30	*Yokosuka, Japan/Navy*	*14,600*
31	*Yokota AB, Japan/AFCOMS*	*14,490*
137	North Island, CA/Navy	14,415
138	Newport, RI/Navy	14,346
139	Aberdeen Prov. Grnds., MD/TSA	14,229
140	Corpus Christi, TX/Navy	14,024
141	Albany, GA/USMC	13,980
142	F.E. Warren AFB, WY/ AFCOMS	13,963
143	George AFB, CA/AFCOMS	13,943
32	*Bitburg AB, FRG/AFCOMS*	*13,877*
144	Seattle, WA/Navy	13,500
145	Annapolis, MD/Navy	13,374
33	*RAF Lakenheath, UK/AFCOMS*	*13,320*
34	*Kaneohe Bay, HI/USMC*	*13,300*
146	San Diego NTC, CA/Navy	13,238
35	*RAF Bentwaters, UK/AFCOMS*	*12,979*
147	England AFB, LA/AFCOMS	12,930
148	Ft. McNair, DC/TSA	12,911
36	*Schweinfurt, FRG/TSA*	*12,880*
149	Minot AFB, ND/AFCOMS	12,872
150	Beale AFB, CA/AFCOMS	12,802
151	Ft. Devens, MA/TSA	12,770
37	*Weisbaden, FRG/TSA*	*12,698*
38	*RAF Upper Heyford, UK/ AFCOMS*	*12,624*
152	Richmond DGSC, VA/TSA	12,586
153	Loring AFB, ME/AFCOMS	12,404
154	Whidbey Island, WA/Navy	12,354
155	Bremerton, WA/Navy	12,352
156	Mitchel Field, NY/Navy	12,290
157	Laughlin AFB, TX/AFCOMS	12,220

Rank	Store/Parent Organization	Total Sq. Ft.
158	Carlile Barracks, PA/TSA	12,072
159	Mayport, FL/Navy	11,700
160	Brunswick, ME/Navy	11,662
161	Edgewood Arsenal, MD/TSA	11,658
39	*Corozal, Panama/TSA*	*11,564*
40	*Ansbach, FRG/TSA*	*11,561*
162	Parris Island, SC/USMC	11,500
163	Goodfellow AFB, TX/AFCOMS	11,440
164	Ft. Hamilton, NY/TSA	11,400
165	Myrtle Beach AFB, SC/ AFCOMS	11,272
166	Hurlburt AFB, FL/AFCOMS	11,132
41	*Grafenwoehr, FRG/TSA*	*11,091*
42	*Schinnen, NL/TSA*	*11,053*
43	*Bad Kreuznach, FRG/TSA*	*10,937*
44	*Aschaffenburg, FRG/TSA*	*10,881*
45	*Ankara, Turkey/AFCOMS*	*10,856*
46	*Robinson Barracks, FRG/TSA*	*10,735*
167	Blytheville AFB, AR/AFCOMS	10,684
47	*Chievres, Belgium/TSA*	*10,609*
48	*Munich, FRG/TSA*	*10,580*
49	*Camp New Amsterdam, NL/ AFCOMS*	*10,579*
168	Charleston NWS, SC/Navy	10,540
169	Yuma, AZ/USMC	10,400
50	*Hahn AB, FRG/AFCOMS*	*10,312*
170	Cecil Field, FL/Navy	10,226
171	Gulfport, MS/Navy	10,076
51	*RAF Alconbury, UK/AFCOMS*	*10,000*
172	Altus AFB, OK/AFCOMS	9,952
52	*Augsburg, FRG/TSA*	*9,749*
173	Twentynine Palms, CA/USMC	9,700
174	Treasure Island, CA/Navy	9,696
175	Selfridge AnG, MI/TSA	9,687
53	*Barbers Point, HI/Navy*	*9,660*
176	New Orleans, LA/Navy	9,600
177	Vance AFB, OK/AFCOMS	9,570

Continued on page 96

Rank	Store/Parent Organization	Total Sq. Ft.
54	*Roosevelt Roads, PR/Navy*	*9,440*
55	*Zweibrecken, FRG/TSA*	*9,430*
178	Patuxent, MD/Navy	9,406
56	*Kitzingen, FRG/TSA*	*9,353*
57	*Bamberg, FRG/TSA*	*9,332*
58	*Heilbronn, FRG/TSA*	*9,328*
59	*Mannheim, FRG/TSA*	*9,277*
179	Brooks AFB, TX/AFCOMS	9,240
60	*Kelley Barracks, FRG/TSA*	*9,153*
180	Key West, FL/Navy	9,139
61	*Eielson AFB, AK/AFCOMS*	*9,130*
62	*Gelnhausen, FRG/TSA*	*9,071*
63	*Sigonella, Italy/Navy*	*9,025*
181	Tobyhanna AD, PA/TSA	9,000
182	Barstow, CA/USMC	9,000
183	Meridian, MS/Navy	8,844
64	*Spangdahlem AB, FRG/AFCOMS*	*8,796*
65	*Rota, Spain/Navy*	*8,716*
184	Fitzsimons AMC, CO/TSA	8,712
185	San Onofre, CA/USMC	8,700
186	Ft. Sheridan, IL/TSA	8,698
66	*Adak, AK/Navy*	*8,480*
187	Yuma Prov. Grnds., AZ/TSA	8,436
67	*Makiminato, Okinawa/AFCOMS*	*8,412*
68	*Hellenikon AB, Greece/AFCOMS*	*8,395*
69	*Sembach AB, FRG/AFCOMS*	*8,352*
188	Scotia, NY/Navy	8,200
70	*Incirlik, Turkey/AFCOMS*	*8,192*
189	Ft. McPherson, GA/TSA	8,100
71	*Wuerzburg, FRG/TSA*	*8,100*
72	*Guantanamo Bay, Cuba/Navy*	*8,100*
190	Vint Hill Farms, VA/TSA	8,088
73	*Ft. Wainwright, AK/TSA*	*8,066*
191	Ft. Monroe, VA/TSA	8,049
192	Arnold AFB, TN/AFCOMS	8,040
74	*Keflavik, Iceland/Navy*	*7,784*
193	Whiting Field, FL/Navy	7,645
194	Point Mugu, CA/Navy	7,520
195	Stockton, CA/Navy	7,422
75	*RAF Greenham Common, UK/ AFCOMS*	*7,213*
76	*Pirmasens, FRG/TSA*	*7,209*
77	*Worms, FRG/TSA*	*7,125*
196	Dugway Prov. Grnds., UT/TSA	7,056
197	Yorktown, VA/Navy	7,056
78	*Subic Bay, PI/Navy*	*7,032*
198	Rock Island, IL/TSA	6,944
79	*Aviano AB, Italy/AFCOMS*	*6,840*
80	*Naples/Navy*	*6,804*
199	White Sands, NM/TSA	6,768
81	*Argentia, Newfoundland/Navy*	*6,726*
82	*Fulda, FRG/TSA*	*6,719*
200	Kingsville, TX/Navy	6,644
83	*Lajes Field, Azores/AFCOMS*	*6,354*
201	New River, NC/USMC	6,344
84	*Atsugi, Japan/Navy*	*6,326*
85	*Ft. Greely, AK/TSA*	*6,290*
86	*San Vito AS, Italy/AFCOMS*	*6,270*
87	*Bad Nauheim, FRG/TSA*	*6,176*
202	Oakdale ASC, PA/TSA	6,000
203	Stewart ASE, NY/TSA	5,900
88	*Taegu, Korea/TSA*	*5,900*
89	*Neu Ulm, FRG/TSA*	*5,717*
90	*Bermuda/Navy*	*5,607*
204	Ft. Irwin, CA/TSA	5,554
91	*Livorno, Italy/TSA*	*5,540*
205	Ft. Ritchie, MD/TSA	5,500
206	Beeville, TX/Navy	5,464
207	West Point, NY/TSA	5,450
92	*RAF Fairford, UK/AFCOMS*	*5,421*
93	*Kobbe/Howard, Panama/TSA*	*5,400*
94	*Zaragoza, Spain/AFCOMS*	*5,384*
95	*Wildflecken, FRG/TSA*	*5,272*
208	Lexington, KY/TSA	5,256
96	*Izmir, Turkey/AFCOMS*	*5,220*
97	*Ft. Gulick, Panama/TSA*	*5,200*
209	Lakehurst, NJ/Navy	5,075
98	*Iwakuni, Japan/USMC*	*5,010*
99	*Dhahran, Saudi Arabia/TSA*	*4,960*
100	*Holy Loch, Scotland/Navy*	*4,841*
101	*RAF Chicksands, UK/AFCOMS*	*4,725*
102	*Illesheim, FRG/TSA*	*4,701*
210	Dahlgren, VA/Navy	4,593
103	*Bad Toelz, FRG/TSA*	*4,572*
104	*Riyadh, Saudi Arabia/TSA*	*4,507*
211	Sierra AD, CA/TSA	4,500
105	*Patch Barracks, FRG/TSA*	*4,464*
106	*Ludwigsburg, FRG/TSA*	*4,428*
107	*Preum AS, FRG/AFCOMS*	*4,409*
212	Athens, GA/Navy	4,400
108	*Bad Aibling, FRG/TSA*	*4,310*
109	*Schwaebisch Gmuend, FRG/TSA*	*4,222*
110	*Iraklion AS (Crete)/AFCOMS*	*4,206*
213	ARDC (Picatinny), PA/TSA	4,080
111	*Lualualei, HI/Navy*	*4,009*
214	Fallon, NV/Navy	4,000
112	*RAF Wethersfield, UK/AFCOMS*	*3,945*
215	China Lake, CA/Navy	3,927
113	*Cairo, Egypt/TSA*	*3,900*
216	Seneca AD, NY/TSA	3,866
114	*Schwaebisch Hall, FRG/TSA*	*3,816*
115	*Vicenza, Italy/TSA*	*3,732*
116	*Wertheim, FRG/TSA*	*3,617*
117	*Edzell, Scotland/Navy*	*3,474*
118	*Bad Hersfeld, FRG/TSA*	*3,390*
119	*Hohenfels, FRG/TSA*	*3,390*
120	*Trier HA, FRG/AFCOMS*	*3,348*
121	*Garmisch, FRG/TSA*	*3,315*
217	Powell, WY/AFCOMS	3,262
122	*Sasebo, Japan/Navy*	*3,208*
123	*Hessisch-Oldendorf, FRG/ AFCOMS*	*3,173*
124	*RAF Sculthorpe, UK/AFCOMS*	*3,148*
218	Fort Fisher AFS, NC/AFCOMS	3,120
125	*Jidda, Saudi Arabia/TSA*	*3,106*
126	*Exmouth, Australia/Navy*	*3,077*
219	Oakland AB, CA/TSA	3,072
220	Avon Park Range, FL/AFCOMS	3,012
127	*Mainz, FRG/TSA*	*2,990*
128	*RAF Menwith Hill, UK/AFCOMS*	*2,926*
221	El Centro, CA/Navy	2,720
222	Gila Bend AF Aux.Fld.,AZ/ AFCOMS	2,663
129	*Hellenikon Branch, Greece/ AFCOMS*	*2,653*
223	Crane, IN/Navy	2,650
130	*Amberg, FRG/TSA*	*2,640*
131	*Idar Oberstein, FRG/TSA*	*2,580*
132	*Oslo, Norway/AFCOMS*	*2,571*
133	*Goeppingen, FRG/TSA*	*2,547*
134	*San Miguel, PI/Navy*	*2,514*
135	*Chinhae, Korea/Navy*	*2,400*
136	*Crailsheim, FRG/TSA*	*2,390*
137	*Bad Kissingen, FRG/TSA*	*2,347*
138	*Berchtesgaden, FRG/TSA*	*2,296*
224	Cutler, ME/Navy	2,252
139	*Bindlach, FRG/TSA*	*2,150*
140	*Erlangen, FRG/TSA*	*2,140*
141	*Florennes, Belgium/AFCOMS*	*1,914*
225	Winter Harbor, ME/Navy	1,876
142	*Pusan, Korea/TSA*	*1,822*
226	Indian Springs Aux. Fld., NV/ AFCOMS	1,721
227	Calumet AFS, MI/AFCOMS	1,670
228	Forsyth, MT/AFCOMS	1,500
229	Havre, MT/AFCOMS	1,500
143	*La Maddalena, Italy/Navy*	*1,500*
230	Port Austin AFS, MI/AFCOMS	1,490
231	Makah AFS, WA/AFCOMS	1,478
144	*Mainz Kastel, Wh/TSA*	*1,440*
145	*Royal Oaks HA, Spain/AFCOMS*	*1,315*
146	*RAF Burtonwood, UK/AFCOMS*	*1,127*
232	Holbrook AFB, AZ/AFCOMS	592
233	Camp Merrill, GA/TSA	451

Army Commissary Sales—FY86

CONUS

Midwest Region/TSA

Store	Store Class	Total Store $ Sales	% of Store Total: Grocery	% of Store Total: Meat	% of Store Total: Produce	Total Sales % Change vs. FY85	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Ft. Ben Harrison, IN	6	16,905,307	81	14	5	3.8	16,336	86	0.46
Ft. Bliss, TX	8	50,184,368	81	15	4	−0.1	32,538	129	1.35
Ft. Carson, CO	8	33,063,541	80	15	4	2.1	21,864	126	0.89
Fitzsimons AMC, CO	6	11,259,935	83	13	4	−9.2	8,712	108	0.30
Granite City AD, IL	6	14,669,011	83	13	3	−3.4	20,789	59	0.39
Ft. Hood, TX	8	54,586,566	81	15	4	5.9	36,551	124	1.47
Ft. Leavenworth, KS	7	19,969,793	83	12	4	3.2	18,437	90	0.54
Ft. Leonard Wood, MO	7	19,377,946	85	10	5	5.2	18,512	87	0.52
Ft. Polk, LA	7	21,435,986	83	13	4	−1.3	19,642	91	0.58
Ft. Riley, KS	7	20,169,876	83	13	4	4.3	23,500	72	0.54
Rock Island, IL	3	3,958,197	86	11	2	1.7	6,944	48	0.11
Ft. Sam Houston, TX	8	35,762,774	82	14	4	4.7	26,904	111	0.96
Selfridge AnG, MI	5	12,080,031	86	11	3	7.0	9,687	104	0.33
Ft. Sheridan, IL	4	8,015,041	87	10	3	5.0	8,698	77	0.22
Ft. Sill, OK	8	32,261,832	81	15	4	0.3	32,951	82	0.87
White Sands, NM	3	3,668,381	82	14	4	1.8	6,768	45	0.10
Region Totals		**$357,368,585**	**82%**	**14%**	**4%**	**2.3%**	**308,833**	**$96**	**9.62%**

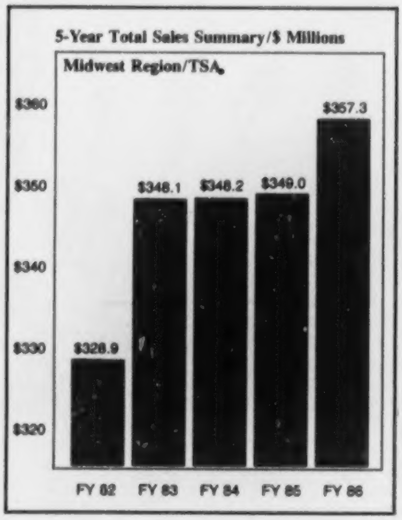
/a Less than 0.1%.
/b Data not available.
n/c No change.
n/a Totals not meaningful for comparison purposes.

Store classes for Army commissaries are based upon total average monthly sales, as follows:

Class 1	Up to $100,000	Class 3	$300,001-$500,000	Class 5	$750,001-$1,000,000	Class 7	$1,500,001-$2,000,000
Class 2	$100,001-$300,000	Class 4	$500,001-$750,000	Class 6	$1,000,001-$1,500,000	Class 8	Over $2,000,000

Notes: All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY86 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data. Details may not add to 100 percent due to rounding.

* *Interservice.*



BELIEVE IT OR NOT!

Can you name the 5 military commissaries (open the full fiscal year) with the lowest average monthly sales per square feet? They are:

1. **RAF Sculthorpe, UK ($6)**
2. **Argentia, Newfoundland ($8)**
3. **Preum AS, FRG ($8)**
4. **RAF Burtonwood, UK ($13)**
5. **Gila Bend AF Aux. Fld., AZ ($13)**

Army Commissary Sales—FY86

Northeast Region/TSA

Store	Store Class	Total Store $ Sales	% of Store Total: Grocery	Meat	Produce	Total Sales % Change vs. FY85	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Aberdeen Prov. Grnds., MD	5	11,730,591	84	12	4	−0.8	14,229	69	0.32
ARDC (Picatinny), PA	2	2,718,196	84	13	4	0.6	4,080	56	0.07
Ft. Belvoir, VA	8	55,268,182	79	16	6	6.5	26,385	175	1.49
Cameron Station, VA	8	31,618,300	80	14	6	1.1	31,616	83	0.85
Carlile Barracks, PA	5	9,953,428	83	13	4	1.8	12,072	69	0.27
Ft. Devens, MA	6	16,060,177	83	13	4	0.1	12,770	105	0.43
Ft. Drum, NY	3	6,361,598	83	13	4	24.2	23,600	22	0.17
Edgewood Arsenal, MD	3	5,887,769	84	12	4	−0.2	11,658	42	0.16
Ft. Hamilton, NY	5	11,200,194	87	10	3	−0.2	11,400	82	0.30
Ft. McNair, DC	4	6,644,393	82	14	5	−3.4	12,911	43	0.18
Ft. Meade, MD*	8	32,716,837	82	14	4	7.0	35,040	78	0.88
Ft. Monmouth, NJ	6	18,146,986	83	12	5	0.4	24,562	62	0.49
Ft. Myer, VA	7	21,259,242	81	14	5	−0.4	19,050	93	0.57
New Cumberland, PA	4	6,448,400	87	10	3	0.9	16,490	33	0.17
Oakdale ASC, PA	4	7,216,705	85	13	2	−4.3	6,000	100	0.19
Ft. Ritchie, MD	4	6,780,033	83	13	4	−0.2	5,500	103	0.18
Seneca AD, NY	2	2,736,032	84	13	3	2.8	3,866	59	0.07
Stewart ASE, NY	3	4,216,726	82	14	4	2.4	5,900	60	0.11
Tobyhanna AD, PA	3	5,683,023	88	9	3	2.8	9,000	53	0.15
Vint Hill Farms, VA	4	7,913,296	81	15	4	1.3	8,088	82	0.21
Walter Reed AMC, DC	8	23,805,932	81	15	4	−3.1	25,858	77	0.64
West Point, NY	4	8,577,728	78	16	6	−2.0	5,450	131	0.23
Region Totals		**$302,943,768**	**82%**	**14%**	**5%**	**2.3%**	**325,525**	**$78**	**8.16%**

*Ft. Meade, MD annex closed June 1986.

/a Less than 0.1%.
/b Data not available.
n/c No change.
n/a Totals not meaningful for comparison purposes.

Store classes for Army commissaries are based upon total average monthly sales, as follows:

Class 1 Up to $100,000
Class 2 $100,001-$300,000
Class 3 $300,001-$500,000
Class 4 $500,001-$750,000
Class 5 $750,001-$1,000,000
Class 6 $1,000,001-$1,500,000
Class 7 $1,500,001-$2,000,000
Class 8 Over $2,000,000

Notes: All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY86 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data. Details may not add to 100 percent due to rounding.

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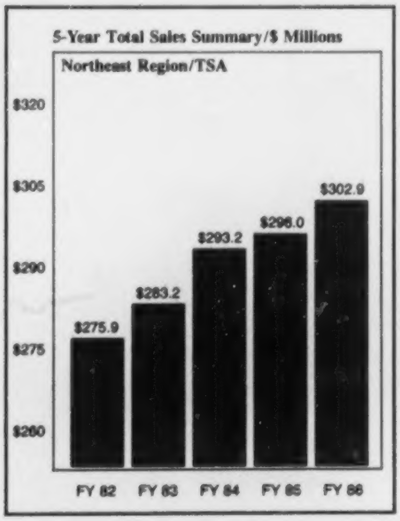

BELIEVE IT OR NOT!

Patron dollars spent at AFCOMS CONUS stores ($1,740,433,420), stacked end-to-end, would extend well out toward Venus, by *Interservice* calculations!

Army Commissary Coupon Redemptions—FY86

CONUS

Region	Number	% Share CONUS	% Share Worldwide	$ Value	% Share CONUS	% Share Worldwide
Midwest	15,300,000	28.9	27.1	7,191,312	31.1	29.7
Northeast	14,400,000	27.2	25.5	5,956,473	25.9	24.6
Southeast	17,900,000	33.8	31.7	7,506,920	32.5	31.1
Western	5,400,000	10.1	9.6	2,433,056	10.5	10.5
CONUS Totals	**53,000,000**	**100.0%**	**93.9%**	**$23,087,761**	**100.0%**	**95.9%**

Overseas

Region	Number	% Share Overseas	% Share Worldwide	$ Value	% Share Overseas	% Share Worldwide
Europe	3,500,000	100.0	6.1	1,087,331	100.0	4.1
Overseas Totals	**3,500,000**	**100.0%**	**6.1%**	**$1,087,331**	**100.0%**	**4.1%**
Worldwide Totals	**56,500,000**	**–**	**100.0%**	**$24,175,092**	**–**	**100.0%**

Note: Data reported for Army commissaries do not reflect actual geographic distribution of coupon redemptions because official figures are reported by Region, with many stores in certain Regions actually operating overseas but reported in CONUS data, and vice-versa.

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How
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Billion
Market?

Did you know that . . .
THE AMERICAN LOGISTICS ASSOCIATION:

- Provides the *only* DoD approved setting for industry to meet with military to address policy and industry issues.
- Produces analytic commissary & exchange sales reports and research on subjects from patron demographics to marketing and merchandising techniques.
- Makes available inexpensive reproductions of military procurement data that is otherwise difficult to obtain
- Provides award programs to recognize industry and military accomplishments.
- Provides educational programs ranging from Merchandising Clinics to Electronic Data Interchange Seminars.

For all these reasons and more, it is important for you to join the American Logistics Association. Make yourself more visible to the military. Expand and increase your military sales. Put yourself in the illustrious presence of over 420 other Member companies who have invested in both ALA and this $12 Billion Market.

Call Lori Ulrich, Membership Coordinator, TODAY for more information, (202) 466-2520.

Army Commissary Sales—FY86

Southeast Region/TSA

Store	Store Class	Total Store $ Sales	% of Store Total: Grocery	Meat	Produce	Total Sales % Change vs. FY85	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Ft. Benning, GA	8	38,745,420	81	15	4	0.5	32,729	99	1.04
Ft. Bragg, NC	8	53,351,580	80	15	4	4.8	42,134	106	1.44
Ft. Campbell, KY	8	37,374,699	80	15	4	6.4	25,770	121	1.01
Ft. Eustis, VA	7	20,376,720	83	13	4	3.2	23,669	72	0.55
Ft. Gillem, GA	7	22,817,919	82	15	3	2.6	22,156	86	0.61
Ft. Gordon, GA	8	25,108,975	80	15	5	−5.2	22,712	92	0.68
Hunter AAF, GA	5	11,051,324	81	14	4	3.3	17,500	53	0.30
Ft. Jackson, SC	7	25,759,628	82	14	5	12.4	35,040	61	0.69
Ft. Knox, KY	8	33,036,737	81	15	4	3.1	31,025	89	0.89
Ft. Lee, VA	7	19,401,045	80	15	5	2.1	25,240	64	0.52
Lexington, KY	2	2,714,798	91	6	3	6.1	5,256	43	/a
Ft. McClellan, AL	6	15,950,784	83	13	4	2.1	15,286	87	0.43
Ft. McPherson, GA	3	5,530,258	83	12	5	−1.3	8,100	57	0.15
Camp Merrill, GA	1	301,904	90	8	2	−11.9	451	56	/a
Ft. Monroe, VA	4	7,874,262	81	14	5	3.9	8,049	82	0.21
Redstone Arsenal, AL	7	22,657,457	82	14	5	3.4	21,279	89	0.61
Richmond DGSC, VA	3	5,447,620	81	15	5	2.9	12,586	36	0.15
Ft. Rucker, AL	7	19,174,836	83	12	5	5.2	17,200	93	0.52
Ft. Stewart, GA	6	15,741,935	80	15	4	0.3	27,953	47	0.42
Region Totals*		**$382,417,901**	**81%**	**14%**	**4%**	**3.3%**	**394,135**	**$81**	**10.30%**

*Excludes sales for Ft. Buchanan, PR, which are reported in overseas data.

/a Less than 0.1%.
/b Data not available.
n/c No change.
n/a Totals not meaningful for comparison purposes.

Store classes for Army commissaries are based upon total average monthly sales, as follows:
Class 1 Up to $100,000
Class 2 $100,001-$300,000
Class 3 $300,001-$500,000
Class 4 $500,001-$750,000
Class 5 $750,001-$1,000,000
Class 6 $1,000,001-$1,500,000
Class 7 $1,500,001-$2,000,000
Class 8 Over $2,000,000

Notes: All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY86 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data. Details may not add to 100 percent due to rounding

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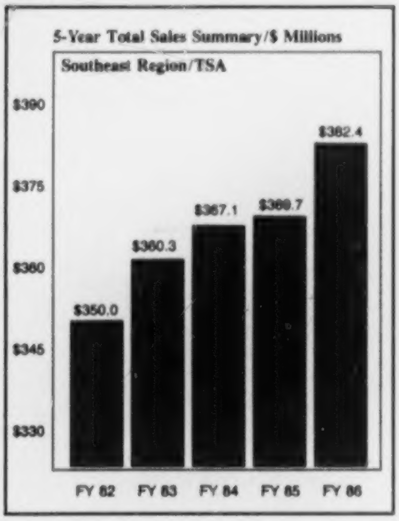


BELIEVE IT OR NOT!

Can you name the military commissary that last year posted the highest figure for average monthly sales per square feet of selling space? The answer: Army's Oakland AB, CA, commissary reported a figure of $194.

Army Commissary Sales—FY86

Western Region/TSA

Store	Store Class	Total Store $ Sales	% of Store Total: Grocery	Meat	Produce	Total Sales % Change vs. FY85	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Dugway Prov. Grnds., UT	2	1,733,205	85	10	5	−0.5	7,056	20	/a
Ft. Huachuca, AZ	6	16,790,470	80	15	4	2.9	20,087	70	0.45
Ft. Irwin, CA	3	4,418,509	83	12	5	9.6	5,554	66	0.12
Ft. Lewis, WA	8	40,700,291	83	13	4	−1.8	35,494	96	1.10
Oakland AB, CA	4	7,137,545	83	13	4	−3.8	3,072	194	0.19
Ft. Ord, CA	8	36,582,014	81	16	4	2.1	18,190	168	0.98
Presidio of S.F., CA	7	18,690,940	78	16	7	0.5	23,264	67	0.50
Sierra AD, CA	2	1,965,178	85	12	3	−2.3	4,500	36	/a
Yuma Prov. Grnds., AZ	2	1,994,441	85	11	4	12.5	8,436	20	/a
Region Totals*		**$130,012,593**	**81%**	**14%**	**4%**	**0.7%**	**125,653**	**$86**	**3.50%**
CONUS TSA Totals		**$1,172,742,847**	**82%**	**14%**	**4%**	**2.5%**	**1,154,146**	**$85**	**31.57%**

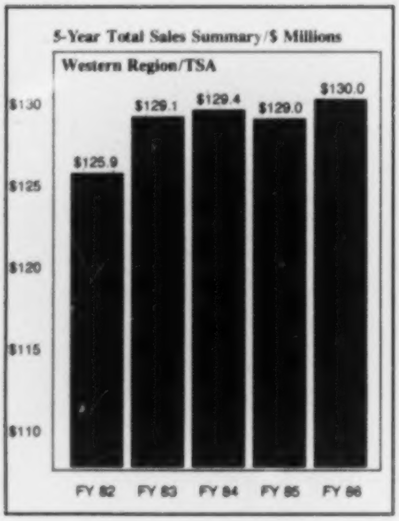
*Excludes sales for Richardson, Greely and Wainwright, AK, and Schofield Barracks, HI, which are reported in overseas data.

/a Less than 0.1%.
/b Data not available.
n/c No change.
n/a Totals not meaningful for comparison purposes.

Store classes for Army commissaries are based upon total average monthly sales, as follows:

Class 1 Up to $100,000	Class 3 $300,001-$500,000	Class 5 $750,001-$1,000,000	Class 7 $1,500,001-$2,000,000
Class 2 $100,001-$300,000	Class 4 $500,001-$750,000	Class 6 $1,000,001-$1,500,000	Class 8 Over $2,000,000

Notes: All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY86 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data. Details may not add to 100 percent due to rounding.



BELIEVE IT OR NOT!

Of the overseas military commissaries for each service, do you know which reported the greatest total store sales declines? (The Marine Corps showed no declines!) They are:

1. **Army's Dhahran, Saudi Arabia (−79.3%)**
2. **Air Force's Makiminato, Okinawa (−25.9%)**
3. **Navy's Lualualei, HI (−12.0%)**

Army Commissary Sales—FY86

OVERSEAS

Midwest Region/Panama-TSA

Store	Store Class	Total Store $ Sales	% of Store Total Grocery	Meat	Produce	Total Sales % Change vs. FY85	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Corozal	7	20,822,883	82	13	4	3.2	11,564	150	2.05
Ft. Gulick	2	3,239,780	83	13	5	82.6	5,200	52	0.32
Kobbe/Howard	4	6,600,207	83	13	4	3.9	5,400	102	0.65
Central Dist. Ctr.*	1	859,158	95	5	0	n/a	n/a	n/a	/a
Panama Totals		**$31,522,028**	**83%**	**13%**	**4%**	**100.0%**	**22,164**	**$304**	**3.10%**

*Charge sales to authorized units.

Southeast Region/Puerto Rico-TSA

Store	Store Class	Total Store $ Sales	% of Store Total Grocery	Meat	Produce	Total Sales % Change vs. FY85	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Ft. Buchanan	**7**	**$22,228,408**	**95%**	**0%**	**5%**	**−0.7%**	**18,084**	**$102**	**2.19%**

Western Region/Alaska, Hawaii & Korea-TSA

Store	Store Class	Total Store $ Sales	% of Store Total Grocery	Meat	Produce	Total Sales % Change vs. FY85	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Ft. Greely, AK	2	2,195,027	79	14	6	4.7	6,290	29	0.22
Pusan, Korea	2	2,219,696	86	7	7	−17.3	1,822	102	0.22
Ft. Richardson, AK	5	11,636,353	81	12	6	17.4	15,713	62	1.14
Sagamihara, Japan	3	6,729,071	85	10	5	17.0	16,792	33	0.66
Schofield Barracks, HI	8	30,829,102	81	13	6	3.9	31,452	82	3.03
Taegu, Korea	4	6,215,727	87	8	5	−8.5	5,900	88	0.61
Ft. Wainwright, AK	4	8,360,604	79	15	6	9.8	8,066	86	0.82
Yongsan, Korea	8	32,314,070	85	11	5	−10.0	27,971	96	3.18
Western (Overseas) Totals		**$100,499,650**	**83%**	**12%**	**6%**	**1.2%**	**114,006**	**$73**	**9.89%**

/a Less than 0.1%.
/b Data not available.
n/c No change.
n/a Totals not meaningful for comparison purposes.

Store classes for Army commissaries are based upon total average monthly sales, as follows:
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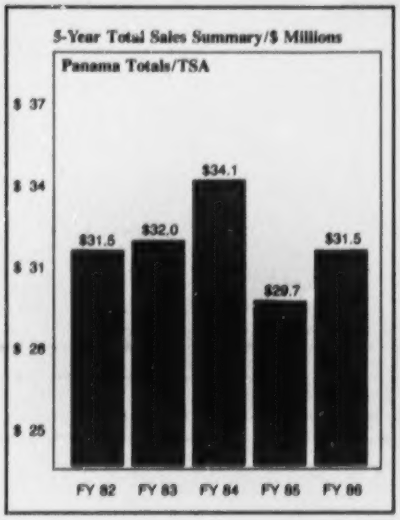
Class 2 $100,001-$300,000
Class 3 $300,001-$500,000
Class 4 $500,001-$750,000
Class 5 $750,001-$1,000,000
Class 6 $1,000,001-$1,500,000
Class 7 $1,500,001-$2,000,000
Class 8 Over $2,000,000

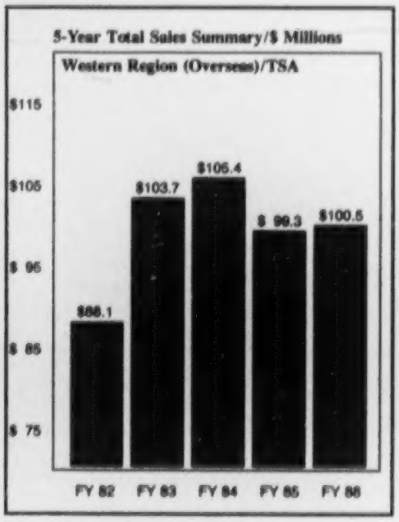
Notes: All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY86 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data. Details may not add to 100 percent due to rounding.

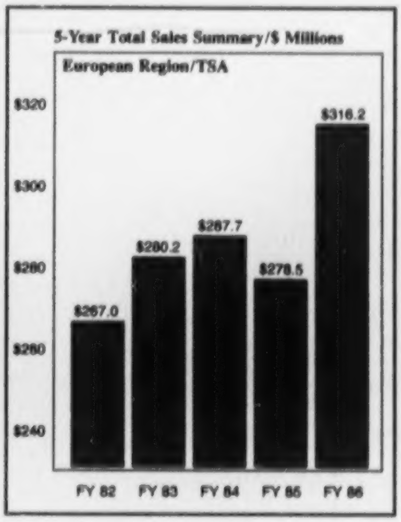
How many CONUS military commissaries there were in operation in FY86? The answer: 231.

BELIEVE IT OR NOT!

Army Commissary Sales—FY86







European Region/TSA

Store	Store Class	Total Store $ Sales	% of Store Total Grocery	% of Store Total Meat	% of Store Total Produce	Total Sales % Change vs. FY85	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Amberg, FRG	2	1,291,263	84	12	5	6.0	2,640	41	0.13
Ansbach, FRG	3	6,011,541	81	15	5	8.5	11,561	43	0.59
Aschaffenburg, FRG	3	5,187,987	82	14	5	11.0	10,881	40	0.51
Augsburg, FRG	4	9,415,522	81	14	4	13.9	9,749	80	0.93
Bad Aibling, FRG	1	968,718	81	12	7	19.7	4,310	19	0.10
Bad Hersfeld, FRG	1	1,194,415	84	12	4	4.1	3,390	29	0.12
Bad Kissingen, FRG	2	1,531,146	82	13	5	0.8	2,347	54	0.15
Bad Kreuznach, FRG	3	4,878,975	82	13	5	14.9	10,937	37	0.48
Bad Nauheim, FRG	2	3,039,658	82	14	4	21.9	6,176	41	0.30
Bad Toelz, FRG	1	1,145,310	79	14	6	13.3	4,572	21	0.11
Bamberg, FRG	4	7,180,887	81	15	4	13.7	9,332	64	0.71
Baumholder, FRG	4	9,307,172	81	14	5	18.0	16,635	47	0.92
Berchtesgaden, FRG	1	1,276,640	84	15	1	11.4	2,296	46	0.13
Berlin (Free Zone), FRG	5	11,247,589	77	15	8	13.6	17,352	54	1.11
Bindlach, FRG	1	1,124,933	84	12	4	12.2	2,150	44	0.11
Bremerhaven, FRG	5	10,172,451	83	13	4	10.5	19,152	44	1.00
Cairo, Egypt	2	1,493,774	94	0	6	−6.3	3,900	32	0.15
Chievres, Belgium	3	6,180,001	79	16	5	13.1	10,609	49	0.61
Crailsheim, FRG	1	973,394	81	14	5	13.9	2,390	34	0.10
Darmstadt, FRG	3	6,560,084	81	16	3	12.1	15,341	36	0.65
Dhahran, Saudi Arabia	2	892,461	95	0	5	−79.3	4,960	15	/a
Erlangen, FRG	2	2,224,758	85	12	4	14.2	2,140	87	0.22
Frankfurt, FRG	6	18,028,881	80	14	5	16.2	19,291	78	1.77
Fuerth, FRG	6	16,144,677	80	16	4	10.9	15,378	87	1.59
Fulda, FRG	3	4,298,058	80	16	4	13.7	6,719	53	0.42

Store	Store Class	Total Store $ Sales	% of Store Total: Grocery	Meat	Produce	Total Sales % Change vs. FY85	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Garmisch, FRG	1	1,088,287	82	12	6	13.0	3,315	27	0.11
Gelnhausen, FRG	2	4,176,676	84	12	4	15.5	9,071	38	0.41
Giessen, FRG	5	11,833,065	81	15	4	16.5	20,123	49	1.16
Goeppingen, FRG	2	2,159,060	82	13	6	13.6	2,547	71	0.21
Grafenwoehr, FRG	3	5,136,067	81	14	5	12.2	11,091	39	0.51
Hanau, FRG	5	11,609,584	82	13	4	14.8	23,580	41	1.14
Heidelberg, FRG	6	14,088,751	78	16	6	13.0	18,910	62	1.39
Heilbronn, FRG	3	4,626,839	80	15	5	8.5	9,328	41	0.46
Hohenfels, FRG	1	1,130,736	83	13	4	5.4	3,390	28	0.11
Idar Oberstein, FRG*	1	148,190	84	12	4	−269.0	2,580	5	/a
Illesheim, FRG	2	2,118,309	82	14	4	6.9	4,701	38	0.21
Jidda, Saudi Arabia**	1	204,957	94	0	6	−227.3	3,106	5	/a
Karlsruhe, FRG	3	6,476,721	80	15	4	15.7	15,197	36	0.64
Kelley Barracks, FRG	2	3,652,648	79	15	6	11.9	9,153	33	0.36
Kitzingen, FRG	3	5,410,773	78	17	5	10.8	9,353	48	0.53
Livorno, Italy	2	2,727,579	79	16	5	14.0	5,540	41	0.27
Ludwigsburg, FRG	2	2,420,552	81	15	4	13.5	4,428	46	0.24
Mainz, FRG	3	4,995,519	79	16	5	12.4	2,990	139	0.49
Mainz Kastel, Wh***	1	61,421	100	0	0	n/a	1,440	4	/a
Mannheim, FRG	5	12,365,750	79	16	5	13.3	9,277	111	1.22
Munich, FRG	3	5,183,852	78	16	6	6.2	10,580	41	0.51
Neu Ulm, FRG	2	3,660,276	79	18	4	2.5	5,717	53	0.36
Patch Barracks, FRG	3	5,993,711	77	18	5	11.1	4,464	112	0.59
Pirmasens, FRG	3	4,740,999	82	14	5	7.9	7,209	55	0.47
Riyadh, Saudi Arabia	2	3,163,420	93	0	7	−4.8	4,507	58	0.31
Robinson Barracks, FRG	4	8,575,421	79	16	5	6.8	10,735	67	0.84
Schinnen, NL	3	4,579,703	80	16	4	11.5	11,053	35	0.45
Schwaebisch Gmuend, FRG	2	2,209,725	83	13	4	12.3	4,222	44	0.22
Schwaebisch Hall, FRG	1	1,107,845	82	13	5	16.5	3,816	24	0.11
Schweinfurt, FRG	1	8,182,698	81	15	4	/b	12,880	53	0.81
Vicenza, Italy	3	5,500,074	80	15	5	8.6	3,732	123	0.54
Wertheim, FRG	1	1,499,555	81	14	4	21.7	3,617	35	0.15
Weisbaden, FRG	6	15,214,692	79	15	5	15.2	12,698	100	1.50
Wildflecken, FRG	2	2,965,395	83	12	5	13.2	5,272	47	0.29
Worms, FRG	2	2,876,631	80	15	5	17.2	7,125	34	0.28
Wuerzburg, FRG	4	7,309,858	81	15	4	14.0	8,100	75	0.72
Zweibrecken, FRG	3	5,331,224	79	16	5	11.5	9,430	47	0.52
Region Totals		**$316,296,858**	**81%**	**15%**	**5%**	**14.2%**	**508,485**	**$52**	**31.12%**
Overseas TSA Totals		**$470,546,944**	**82%**	**13%**	**5%**	**8.6%**	**662,739**	**$59**	**46.30%**
Worldwide TSA Totals		**$1,643,289,791**	**82%**	**14%**	**4%**	**4.2%**	**1,816,885**	**$75**	**84.74%**

*Jidda, Saudi Arabia commissary became annex to Riyadh, Saudi Arabia commissary, 2nd qu FY86, then closed August 1986.
**Idar Oberstein, Germany commissary became annex to Baumholder, Germany commissary with the activation of the District Oriented Store System 2nd qu FY86.
***Mainz Kastel, Germany annex to Wiesbaden, Germany commissary closed March 1986.

/a Less than 0.1%.
/b Data not available.
n/c No change.
n/a Totals not meaningful for comparison purposes.

Store classes for Army commissaries are based upon total average monthly sales, as follows:
Class 1 Up to $100,000
Class 2 $100,001-$300,000
Class 3 $300,001-$500,000
Class 4 $500,001-$750,000
Class 5 $750,001-$1,000,000
Class 6 $1,000,001-$1,500,000
Class 7 $1,500,001-$2,000,000
Class 8 Over $2,000,000

Notes: All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY86 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data. Details may not add to 100 percent due to rounding.

Marine Corps Commissary Sales—FY86

CONUS

East Coast Complex/USMC

Store	Store Class	Total Store $ Sales	% of Store Total			Total Sales % Change vs. FY85	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
			Grocery	Meat	Produce				
Albany, GA	3	5,591,366	76	19	5	4.9	13,980	33	0.15
Hadnot Point, NC	6	13,035,091	76	20	4	−2.0	16,627	65	0.35
Tarawa Terrace, NC	6	13,995,906	75	21	4	−0.9	18,053	65	0.38
Cherry Point, NC	6	16,598,798	79	16	5	1.4	18,655	74	0.45
New River, NC	2	3,215,746	77	18	5	3.8	6,344	42	/a
Parris Island, SC	4	8,077,515	78	16	6	0.7	11,500	58	0.22
Quantico, VA	7	22,096,202	76	19	5	−2.5	19,500	94	0.59
Complex Totals		**$82,610,624**	**77%**	**18%**	**5%**	**−0.3%**	**104,659**	**$66**	**2.22%**

West Coast Complex/USMC

Store	Store Class	Total Store $ Sales	% of Store Total			Total Sales % Change vs. FY85	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
			Grocery	Meat	Produce				
Barstow, CA	2	3,329,416	76	17	7	13.7	9,000	31	/a
Camp Pendleton, CA	7	22,048,282	74	18	8	5.2	26,000	71	0.59
San Onofre, CA	3	4,004,790	77	15	8	7.3	8,700	38	0.11
El Toro, CA	7	23,341,265	77	16	7	−3.3	25,000	78	0.63
Twentynine Palms, CA	4	7,523,774	77	17	6	6.3	9,700	65	0.20
Yuma, AZ	4	6,394,664	80	15	5	5.0	10,400	51	0.17
Complex Totals		**$66,642,191**	**77%**	**16%**	**7%**	**2.8%**	**88,800**	**$63**	**1.79%**
CONUS USMC Totals		**$149,252,815**	**77%**	**18%**	**5%**	**1.6%**	**193,459**	**$65**	**4.01%**

/a Less than 0.1%.
n/a Totals not meaningful for comparison purposes.

Store classes for Marine Corps commissaries are based upon total average monthly sales, as follows:

Class 1 Up to $100,000	Class 3 $300,001-$500,000	Class 5 $750,001-$1,000,000	Class 7 $1,500,001-$2,000,000
Class 2 $100,001-$300,000	Class 4 $500,001-$750,000	Class 6 $1,000,001-$1,500,000	Class 8 Over $2,000,000

Notes: All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY86 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data. Details may not add to 100 percent due to rounding.

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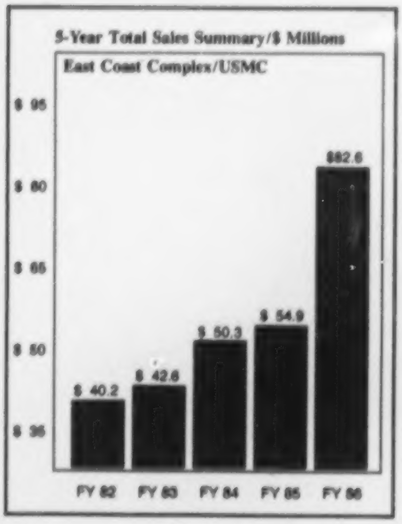

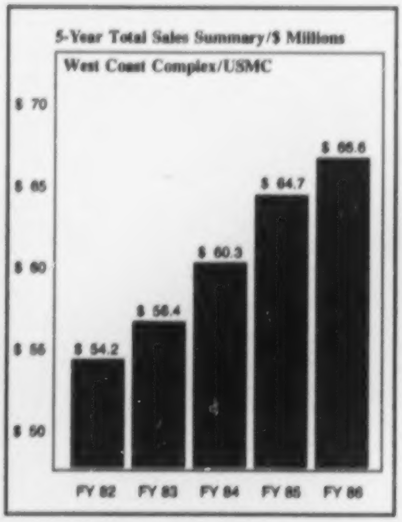

BELIEVE IT OR NOT!

Do you know how many overseas military commissaries there were in operation in FY86? The answer: 144.

Marine Corps Commissary Coupon Redemptions—FY86

CONUS

Store	Number	% Share CONUS	% Share Worldwide	$ Value	% Share CONUS	% Share Worldwide
Albany, GA	243,309	4.5	4.3	76,362	4.7	4.4
Barstow, CA	64,623	1.2	1.1	31,413	1.9	1.8
Camp Pendleton, CA	739,892	13.6	12.9	228,050	14.0	13.3
Cherry Point NC	550,238	10.1	9.6	162,629	9.9	9.4
El Toro, CA	1,064,829	19.6	18.7	325,313	19.9	18.9
Hadnot Point, NC	449,338	8.3	7.9	131,619	8.0	7.6
New River, NC	73,798	1.4	1.3	22,278	1.4	1.3
Parris Island, SC	306,748	5.7	5.4	87,623	5.4	5.1
Quantico, VA	1,022,558	18.9	17.8	297,883	18.2	17.3
San Onofre, CA	124,081	2.3	2.2	40,052	2.4	2.3
Tarawa Terrace, NC	457,695	8.4	8.0	132,598	8.1	7.7
Twentynine Palms, CA	177,292	3.3	3.1	57,445	3.4	3.3
Yuma, AZ	143,998	2.7	2.5	44,313	2.7	2.6
CONUS Totals	**5,418,399**	**100.0%**	**94.8%**	**$1,637,578**	**100.0%**	**95.0%**

Overseas

Store	Number	% Share Overseas	% Share Worldwide	$ Value	% Share Overseas	% Share Worldwide
Iwakuni, Japan	32,913	11.4	0.6	8,548	9.9	0.5
Kaneohe Bay, HI	257,000	88.6	4.5	77,712	90.1	4.5
Overseas Totals	**289,913**	**100.0%**	**5.1%**	**$86,260**	**100.0%**	**5.0%**
Worldwide Totals	**5,708,312**	**–**	**100.0%**	**$1,723,838**	**–**	**100.0%**

All-Service Commissary Store Rankings by Average Monthly $ Sales/Square Foot...based on FY86 Sales

Overseas stores are shown in italics but are not ranked separately from CONUS stores.

Parent agency or branch of service for each commissary is shown to right of store name and location.

AFCOMS—Air Force Commissary Service

NAVY—Navy Resale System

TSA—U.S. Army Troop Support Agency

USMC—U.S. Marine Corps

Data are unadjusted for number of shopping days, and are based on official but preliminary sales reports.

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Rank	Store/Parent Organization	Avg. Mo. Sales/SF
1	Oakland AB, CA/TSA	194
2	Ft. Belvoir, VA/TSA	175
1	*Pearl Harbor, HI/Navy*	*175*
3	Ft. Ord, CA/TSA	168
4	MacDill AFB, FL/AFCOMS	163
2	*Corozal, Panama/TSA*	*150*
3	*Mainz, FRG/TSA*	*139*
4	*Subic Bay, PI/Navy*	*136*
5	West Point, NY/TSA	131
6	Ft. Bliss, TX/TSA	129
7	Ft. Carson, CO/TSA	126
8	Ft. Hood, TX/TSA	124
5	*Vicenza, Italy/TSA*	*123*
9	Moffett Field, CA/Navy	122
10	Ft. Campbell, KY/TSA	121
6	*Hickam AFB, HI/AFCOMS*	*117*
11	McChord AFB, WA/AFCOMS	115
12	Langley AFB, VA/AFCOMS	113
13	Nellis AFB, NV/AFCOMS	112
7	*Patch Barracks, FRG/TSA*	*112*
14	Ft. Sam Houston, TX/TSA	111
8	*Mannheim, FRG/TSA*	*111*
15	Jacksonville, FL/Navy	110
16	Andrews AFB, MD/AFCOMS	109
17	Fitzsimons AMC, CO/TSA	108
18	Barksdale AFB, LA/AFCOMS	107
19	Ft. Bragg, NC/TSA	106
20	Bergstrom AFB, TX/AFCOMS	105
21	Ft. Devens, MA/TSA	105
22	Travis AFB, CA/AFCOMS	104
23	Eglin AFB, FL/AFCOMS	104
24	Selfridge AnG, MI/TSA	104
25	Davis-Monthan AFB, AZ/AFCOMS	103
26	Ft. Ritchie, MD/TSA	103
9	*Clark AB, PI/AFCOMS*	*102*
10	*Kobbe/Howard, Panama/TSA*	*102*
11	*Ft. Buchanan, Puerto Rico/TSA*	*102*
12	*Pusan, Korea/TSA*	*102*
27	Tinker AFB, OK/AFCOMS	101
28	Seattle, WA/Navy	101
29	Homestead AFB, FL/AFCOMS	100
30	Oakdale ASC, PA/TSA	100
31	Oceana, VA/Navy	100
13	*Weisbaden, FRG/TSA*	*100*
32	McGuire AFB, NJ/AFCOMS	99
33	Peterson AFB, CO/AFCOMS	99
34	Ft. Benning, GA/TSA	99
35	Miramar, CA/Navy	99
36	Patrick AFB, FL/AFCOMS	98
37	Fairchild AFB, WA/AFCOMS	96
38	Randolph AFB, TX/AFCOMS	96
39	Ft. Lewis, WA/TSA	96
14	*Yongsan, Korea/TSA*	*96*
40	Kirtland AFB, NM/AFCOMS	95
41	San Diego NS, CA/Navy	94
42	Quantico, VA/USMC	94
43	Beale AFB, CA/AFCOMS	93
44	Scott AFB, IL/AFCOMS	93
45	Ft. Myer, VA/TSA	93
46	Ft. Rucker, AL/TSA	93
47	Luke AFB, AZ/AFCOMS	92
48	Ft. Gordon, GA/TSA	92
49	Little Creek, VA/Navy	92
15	*Guam/Navy*	*92*

Rank	Store/Parent Organization	Avg. Mo. Sales/SF
50	Ft. Polk, LA/TSA	91
16	*RAF Lakenheath, UK/AFCOMS*	*91*
51	Norton AFB, CA/AFCOMS	90
52	Ft. Leavenworth, KS/TSA	90
53	Hurlburt AFB, FL/AFCOMS	89
54	Ft. Knox, KY/TSA	89
55	Redstone Arsenal, AL/TSA	89
56	Keesler AFB, MS/AFCOMS	88
57	Shaw AFB, SC/AFCOMS	88
58	New Orleans, LA/Navy	88
17	*Andersen AFB, Guam/AFCOMS*	*88*
18	*Taegu, Korea/TSA*	*88*
19	*Naples, Italy/Navy*	*88*
59	George AFB, CA/AFCOMS	87
60	Mather AFB, CA/AFCOMS	87
61	Ft. Leonard Wood, MO/TSA	87
62	Ft. McClellan, AL/TSA	87
63	New London, CT/Navy	87
20	*Erlangen, FRG/TSA*	*87*
21	*Fuerth, FRG/TSA*	*87*
64	Wright-Patterson AFB, OH/AFCOMS	86
65	Ft. Ben Harrrison, IN/TSA	86
66	Ft. Gillem, GA/TSA	86
22	*Ft. Wainwright, AK/TSA*	*86*
67	Little Rock AFB, AR/AFCOMS	84
68	Whidbey Island, WA/Navy	84
69	Cameron Station, VA/TSA	83
70	Lowry AFB, CO/AFCOMS	82
71	USAF Academy, CO/AFCOMS	82
72	Ft. Sill, OK/TSA	82
73	Ft. Hamilton, NY/TSA	82
74	Vint Hill Farms, VA/TSA	82
75	Ft. Monroe, VA/TSA	82
76	Charleston NWS, SC/Navy	82
23	*Schofield Barracks, HI/TSA*	*82*
77	Offutt AFB, NE/AFCOMS	81
78	Mayport, FL/Navy	81
24	*Yokota AB, Japan/AFCOMS*	*81*
79	Altus AFB, OK/AFCOMS	80
25	*Ramstein AB, FRG/AFCOMS*	*80*
26	*Augsburg, FRG/TSA*	*80*
80	Carswell AFB, TX/AFCOMS	79
81	North Island, CA/Navy	79
27	*Kaneohe Bay, HI/USMC*	*79*
82	England AFB, LA/AFCOMS	78
83	Myrtle Beach AFB, SC/AFCOMS	78
84	Ft. Meade, MD/TSA	78
85	El Toro, CA/USMC	78
28	*Eielson AFB, AK/AFCOMS*	*78*
29	*Frankfurt, FRG/TSA*	*78*
86	Lackland AFB, TX/AFCOMS	77
87	Charleston AFB, SC/AFCOMS	77
88	Ft. Sheridan, IL/TSA	77
89	Walter Reed AMC, DC/TSA	77
30	*Hahn AB, FRG/AFCOMS*	*77*
31	*Vogelweh, FRG/AFCOMS*	*77*
32	*Hellenikon Branch, Greece/AFCOMS*	*77*
90	Dyess AFB, TX/AFCOMS	76
33	*Osan AB, Korea/AFCOMS*	*76*
34	*Holy Loch, Scotland/Navy*	*76*
91	Pensacola, FL/Navy	75
35	*Wuerzburg, FRG/TSA*	*75*
36	*Barbers Point, HI/Navy*	*75*
92	Griffiss AFB, NY/AFCOMS	74
93	Cherry Point, NC/USMC	74
94	March AFB, CA/AFCOMS	73
95	Hill AFB, UT/AFCOMS	73
96	Bolling AFB, DC/AFCOMS	72
97	Seymour Johnson AFB, NC/AFCOMS	72
98	Ft. Riley, KS/TSA	72
99	Ft. Eustis, VA/TSA	72
100	Newport, RI/Navy	72
101	Long Beach, CA/Navy	72
37	*Kadena AB, Okinawa/AFCOMS*	72
102	Camp Pendleton, CA/USMC	71
38	*Goeppingen, FRG/TSA*	*71*
103	Ft. Huachuca, AZ/TSA	70
104	Aberdeen Prov. Grnds., MD/TSA	69
105	Carliie Barracks, PA/TSA	69
106	Port Hueneme, CA/Navy	69
39	*Butler, Okinawa/AFCOMS*	*69*
40	*Roosevelt Roads, PR/Navy*	*69*
107	Williams AFB, AZ/AFCOMS	68
108	Castle AFB, CA/AFCOMS	67
109	Presidio of S.F., CA/TSA	67
41	*Elmendorf AFB, AK/AFCOMS*	*67*
42	*Robinson Barracks, FRG/TSA*	*67*
110	McClellan AFB, CA/AFCOMS	66
111	Ft. Irwin, CA/TSA	66
112	Great Lakes, IN/Navy	66
113	Hadnot Point, NC/USMC	65
114	Tarawa Terrace, NC/USMC	65
115	Twentynine Palms, CA/USMC	65
116	Vandenberg AFB, CA/AFCOMS	64
117	F.E. Warren AFB, WY/AFCOMS	64
118	Ft. Lee, VA/TSA	64
119	Alameda, CA/Navy	64
120	Memphis, TN/Navy	64
43	*Lajes Field, Azores/AFCOMS*	*64*
44	*Bamberg, FRG/TSA*	*64*
121	Ellsworth AFB, SD/AFCOMS	63
122	Pease AFB, NH/AFCOMS	63
123	Sheppard AFB, TX/AFCOMS	63
124	Mt. Home AFB, ID/AFCOMS	62
125	Ft. Monmouth, NJ/TSA	62
126	Patuxent, MD/Navy	62
45	*Ft. Richardson, AK/TSA*	*62*
46	*Heidelberg, FRG/TSA*	*62*
127	Minot AFB, ND/AFCOMS	61
128	Dover AFB, DE/AFCOMS	61
129	Ft. Jackson, SC/TSA	61
47	*Spangdahlem AB, FRG/AFCOMS*	*61*
130	Blytheville AFB, AR/AFCOMS	60
131	Maxwell AFB, AL/AFCOMS	60
132	Robins AFB, GA/AFCOMS	60
133	Stewart ASE, NY/TSA	60
48	*RAF Upper Heyford, UK/AFCOMS*	*60*
49	*Yokosuka, Japan/Navy*	*60*
134	Gunter AFB, AL/AFCOMS	59
135	Tyndall AFB, FL/AFCOMS	59
136	Brooks AFB, TX/AFCOMS	59
137	Goodfellow AFB, TX/AFCOMS	59
138	Granite City AD, IL/TSA	59
139	Seneca AD, NY/TSA	59
140	Brunswick, ME/Navy	59
141	Orlando, FL/Navy	59
142	China Lake, CA/Navy	59
50	*Rhein Main AB, FRG/AFCOMS*	*59*
51	*Bermuda/Navy*	*59*
143	Parris Island, SC/USMC	58
52	*Riyadh, Saudi Arabia/TSA*	*58*
53	*Rota, Spain/Navy*	58
144	Malmstrom AFB, MT/AFCOMS	57
145	Ft. McPherson, GA/TSA	57
146	Bremerton, WA/Navy	57
147	Loring AFB, ME/AFCOMS	56
148	ARDC (Picatinny), PA/TSA	56
149	Camp Merrill, GA/TSA	56
150	Norfolk, VA/Navy	56
54	*Guantanamo Bay, Cuba/Navy*	*56*
151	Mare Island, CA/Navy	55
55	*Pirmasens, FRG/TSA*	*55*
56	*La Maddalena, Italy/Navy*	*55*
152	Moody AFB, GA/AFCOMS	54
153	Cecil Field, FL/Navy	54
57	*RAF Bentwaters, UK/AFCOMS*	*54*
58	*Bad Kissingen, FRG/TSA*	*54*
59	*Berlin (Free Zone), FRG/TSA*	*54*
154	Grand Forks AFB, ND/AFCOMS	53
155	McConnell AFB, KS/AFCOMS	53
156	Tobyhanna AD, PA/TSA	53
157	Hunter AAF, GA/TSA	53
158	San Diego NTC, CA/Navy	53
60	*RAF Alconbury, UK/AFCOMS*	*53*
61	*Fulda, FRG/TSA*	*53*
62	*Neu Ulm, FRG/TSA*	*53*
63	*Schweinfurt, FRG/TSA*	*53*
159	Columbus AFB, MS/AFCOMS	52
160	Annapolis, MD/Navy	52
64	*Ft. Gulick, Panama/TSA*	*52*
161	Edwards AFB, CA/AFCOMS	51
162	Mitchel Field, NY/Navy	51
163	Portsmouth, VA/Navy	51
164	Yuma, AZ/USMC	51
65	*Bitburg AB, FRG/AFCOMS*	*51*
66	*Sembach AB, FRG/AFCOMS*	*51*
67	*Iwakuni, Japan/USMC*	*51*
165	Hanscom AFB, MA/AFCOMS	50
68	*Incirlik, Turkey/AFCOMS*	*50*
69	*Aviano AB, Italy/AFCOMS*	*49*
70	*Chievres, Belgium/TSA*	*49*
71	*Giessen, FRG/TSA*	*49*
166	Holloman AFB, NM/AFCOMS	48
167	Rock Island, IL/TSA	48
168	Bangor, WA/Navy	48

Continued on page 136

BELIEVE IT OR NOT!

Which 5 U.S. States reported the lowest DoD totals for FY86 military commissary sales? They are:

1. Wyoming ($10,947,461)
2. Idaho ($11,261,147)
3. Montana ($11,624,997)
4. Rhode Island ($12,336,339)
5. South Dakota ($13,148,391)

The overseas country that reported the highest Dod total for FY86 military commissary sales is, of course, Germany ($373,315,134). The lowest overseas total: Australia ($507,760).

Marine Corps Commissary Sales—FY86 OVERSEAS

Overseas/USMC

Store	Store Class	Total Store $ Sales	% of Store Total Grocery	% of Store Total Meat	% of Store Total Produce	Total Sales % Change vs. FY85	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Iwakuni, Japan	2	3,059,059	84	12	4	7.7	5,010	51	0.30
Kaneohe Bay, HI	6	12,538,873	77	15	8	2.3	13,300	79	1.23
Overseas USMC Totals		**$15,597,932**	**81%**	**14%**	**6%**	**3.3%**	**18,310**	**$71**	**1.53%**
Worldwide USMC Totals		**$164,850,747**	**77%**	**18%**	**6%**	**1.3%**	**211,769**	**$65**	**3.48%**

/a Less than 0.1%.
n/a Totals not meaningful for comparison purposes.

Store classes for Marine Corps commissaries are based upon total average monthly sales, as follows:
Class 1 Up to $100,000
Class 2 $100,001-$300,000
Class 3 $300,001-$500,000
Class 4 $500,001-$750,000
Class 5 $750,001-$1,000,000
Class 6 $1,000,001-$1,500,000
Class 7 $1,500,001-$2,000,000
Class 8 Over $2,000,000

Notes: All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY86 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data. Details may not add to 100 percent due to rounding.

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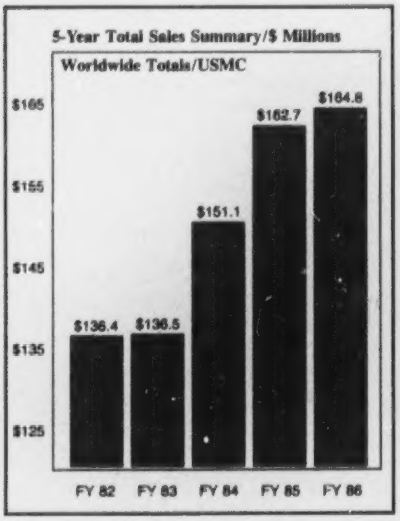

5-Year Total Sales Summary/$ Millions

Which Marine Corps commissary reported the greatest increase of sales from FY85? The answer: Barstow, CA with 13.7%!

BELIEVE IT OR NOT!

What are the top 20 CONUS and overseas military commissaries with the largest total square feet of sales are? They are:

CONUS
1. Carswell AFB, TX (50,000)
2. Lackland AFB, TX (43,870)
3. Ft. Bragg, NC (42,134)
4. Wright-Patterson AFB, OH (39,750)
5. McGuire AFB, NJ (39,444)
6. Imperial Beach, CA (38,600)
7. Miramar, CA (38,600)
8. Ft. Hood, TX (36,551)
9. Little Creek, VA (35,912)
10. Ft. Lewis, WA (35,494)
11. Lowry AFB, CO (35,413)
12. Ft. Meade, MD (35,040)
13. Ft. Jackson, SC (35,040)
14. Ft. McClellan AFB, CA (35,000)
15. Randolph ABF, TX (33,628)
16. McChord AFB, WA (32,979)
17. Ft. Sill, OK (32,951)
18. Ft. Benning, GA (32,729)
19. San Diego NS, CA (32,590)
20. Ft. Bliss, TX (32,538)

Overseas
1. Schofield Barracks, HI (31,452)
2. Elmendorf AFB, AK (31,129)
3. Kadena AB, Okinawa (29,225)
4. Yongsan, Korea (27,971)
5. Pearl Harbor, HI (24,641)
6. Ramstein AB, FRG (24,616)
7. Hanau, FRG (23,580)
8. Clark AB, PI (23,128)
9. Hickam AFB, HI (22,144)
10. Misawa AB, Japan (21,151)
11. Osan AB, Korea (20,250)
12. Giessen, FRG (20,123)
13. Frankfurt, FRG (19,291)
14. Bremerhaven, FRG (19,152)
15. Heidelberg, FRG (18,910)
16. Ft. Buchanan, Puerto Rico (18,084)
17. Berlin (Free Zone), FRG (17,352)
18. Vogelweh, FRG (17,349)
19. Sagamihara, Japan (16,792)
20. Baumholder, FRG (16,635)

Navy Commissary Sales—FY86 CONUS

Auburn Division/Navy

Store	Store Class	Total Store $ Sales	% of Store Total Grocery	Meat	Produce	Total Sales % Change vs. FY85	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Bangor, WA	5	12,699,330	77	15	8	8.3	22,000	48	0.34
Bremerton, WA	5	8,401,157	76	17	8	−985.5	12,352	57	0.23
Seattle, WA	6	16,294,522	75	18	7	−1.8	13,500	101	0.44
Whidbey Island, WA	6	12,523,343	76	16	8	2.6	12,354	84	0.34
Division Totals		**$49,918,352**	**76%**	**17%**	**8%**	**−163.7%**	**60,206**	**$69**	**1.34%**

Pensacola Region/Navy

Store	Store Class	Total Store $ Sales	% of Store Total Grocery	Meat	Produce	Total Sales % Change vs. FY85	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Beeville, TX	2	2,055,410	78	16	6	1.4	5,464	31	0.06
Corpus Christi, TX	4	7,389,780	76	17	7	−3.1	14,024	44	0.20
Kingsville, TX	2	2,113,727	76	18	6	3.7	6,644	27	0.06
Gulfport, MS	3	5,122,416	77	18	5	−1.1	10,076	42	0.14
Memphis, TN	6	17,231,005	77	17	6	4.4	22,468	64	0.46
Meridian, MS	3	4,121,626	77	18	5	−2.4	8,844	39	0.11
New Orleans, LA	5	10,186,520	76	18	6	−2.0	9,600	88	0.27
Pensacola, FL	7	20,742,019	75	18	7	−1.0	23,044	75	0.56
Whiting Field, FL	3	3,868,119	76	18	6	−0.8	7,645	42	0.10
Region Totals		**$72,830,622**	**76%**	**18%**	**6%**	**0.1%**	**107,809**	**$56**	**1.96%**

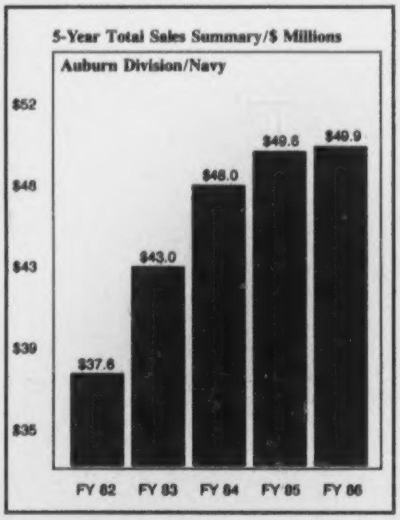
/a Less than 0.1%.
n/a Totals not meaningful for comparison purposes.
* Data not available.

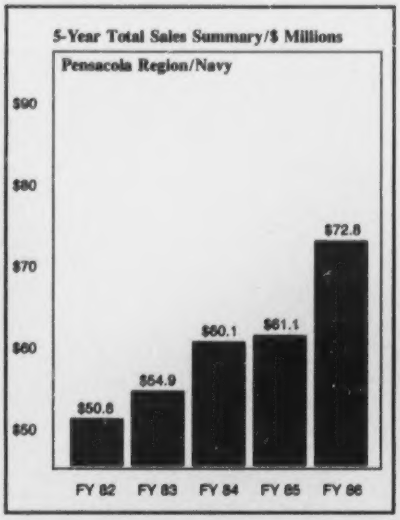
Store classes for Navy commissaries are based upon total average monthly sales, as follows:

Class 1 Up to $100,000	Class 3 $300,001-$500,000	Class 5 $750,001-$1,000,000	Class 7 $1,500,001-$2,000,000
Class 2 $100,001-$300,000	Class 4 $500,001-$750,000	Class 6 $1,000,001-$1,500,000	Class 8 Over $2,000,000

Notes: All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY86 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data. Details may not add to 100 percent due to rounding.

° *Interservice.*





BELIEVE IT OR NOT!

Five U.S. States have no military commissaries at all. They are:

1. Iowa
2. Minnesota
3. Vermont
4. West Virginia
5. Wisconsin

Navy Commissary Sales—FY86

Davisville Division/Navy

Store	Store Class	Total Store $ Sales	% of Store Total Grocery	% of Store Total Meat	% of Store Total Produce	Total Sales % Change vs. FY85	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Brunswick, ME	4	8,193,172	77	17	6	4.6	11,662	59	0.22
Cutler, ME	1	594,980	79	16	5	−5.3	2,252	22	0.02
Mitchel Field, NY	7	7,472,561	72	20	8	−0.1	12,290	51	0.20
New London, CT	7	22,630,864	76	17	7	−0.8	21,685	87	0.61
Newport, RI	6	12,336,339	74	18	8	−5.3	14,346	72	0.33
Scotia, NY	2	2,968,742	78	18	5	−0.2	8,200	30	0.08
Winter Harbor, ME	1	647,432	80	15	5	−13.6	1,876	29	0.02
Division Totals		**$54,844,090**	**77%**	**17%**	**6%**	**12.6%**	**72,311**	**$63**	**1.48%**

Mechanicsburg Region/Navy

Store	Store Class	Total Store $ Sales	% of Store Total Grocery	% of Store Total Meat	% of Store Total Produce	Total Sales % Change vs. FY85	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Crane, IN	1	559,658	81	16	3	6.5	2,650	18	0.02
Great Lakes, IN	6	14,813,200	76	18	6	−2.3	18,700	66	0.40
Annapolis, MD	4	8,267,059	73	20	7	−2.8	13,374	52	0.22
Dahlgren, VA	1	1,088,250	77	18	5	5.1	4,593	20	0.03
Lakehurst, NJ	2	2,827,002	72	21	7	0.9	5,075	46	0.08
Patuxent, MD	4	6,981,491	77	16	7	−0.2	9,406	62	0.19
Philadelphia, PA	4	8,847,696	73	20	7	−1.6	17,502	42	0.24
Region Totals		**$43,384,356**	**76%**	**18%**	**6%**	**n/a**	**71,300**	**$51**	**1.17%**

/a Less than 0.1%.
n/a Totals not meaningful for comparison purposes.
* Data not available.

Store classes for Navy commissaries are based upon total average monthly sales, as follows:

Class 1	Up to $100,000	Class 5	$750,001–$1,000,000
Class 2	$100,001–$300,000	Class 6	$1,000,001–$1,500,000
Class 3	$300,001–$500,000	Class 7	$1,500,001–$2,000,000
Class 4	$500,001–$750,000	Class 8	Over $2,000,000

Notes: All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY86 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data. Details may not add to 100 percent due to rounding.

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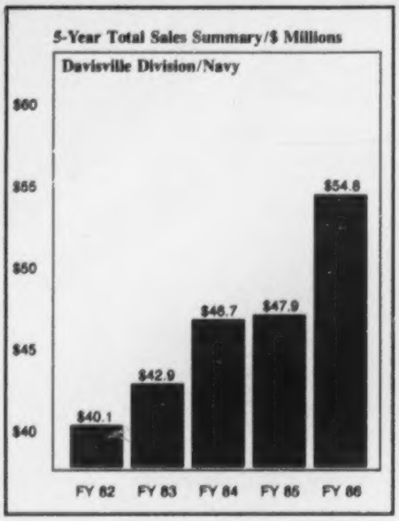
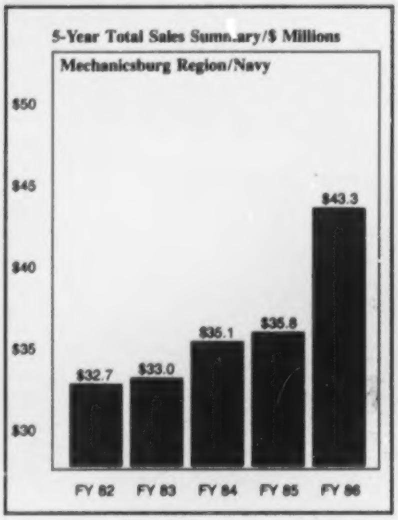
Navy Commissary Sales—FY86





BELIEVE IT OR NOT!

All of the services bucked FY85's general trend of declining sales. The only decrease in sales reported was the Navy in its worldwide meat sales—and just by a mere 0.5%!

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Navy Commissary Sales—FY86

Jacksonville Group/Navy

Store	Store Class	Total Store $ Sales	% of Store Total			Total Sales % Change vs. FY85	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
			Grocery	Meat	Produce				
Athens, GA	2	2,374,821	76	17	7	1.8	4,400	45	0.06
Cecil Field, FL	4	6,652,646	73	21	6	−4.2	10,226	54	0.18
Charleston NS, SC	5	10,148,545	81	13	6	0.5	25,727	33	0.27
Charleston NWS, SC	5	10,408,001	81	13	6	5.9	10,540	82	0.28
Jacksonville, FL	8	25,954,296	75	18	7	−4.0	19,728	110	0.70
Key West, FL	3	4,687,728	75	17	8	3.7	9,139	43	0.13
Kings Bay, GA	2	2,935,350	78	16	6	79.3	17,000	14	0.08
Mayport, FL	6	11,409,554	75	19	6	−6.5	11,700	81	0.31
Orlando, FL	7	21,263,638	74	19	7	−1.9	30,155	59	0.57
Group Totals		**$95,834,579**	**76%**	**17%**	**7%**	**0.8%**	**138,615**	**$58**	**2.58%**

Norfolk Group/Navy

Store	Store Class	Total Store $ Sales	% of Store Total			Total Sales % Change vs. FY85	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
			Grocery	Meat	Produce				
Little Creek, VA	8	39,489,157	76	17	7	−0.3	35,912	92	1.06
Norfolk, VA	6	17,423,596	78	17	5	1.2	25,711	56	0.47
Oceana, VA	8	28,556,466	77	17	6	1.0	23,839	100	0.77
Portsmouth, VA	6	12,952,315	77	18	5	0.8	21,346	51	0.35
Yorktown, VA	2	3,016,387	73	20	7	2.7	7,056	36	0.08
Group Totals		**$101,437,921**	**76%**	**18%**	**6%**	**0.5%**	**113,864**	**$74**	**2.73%**

Oakland Division/Navy

Store	Store Class	Total Store $ Sales	% of Store Total			Total Sales % Change vs. FY85	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
			Grocery	Meat	Produce				
Alameda, CA	6	17,512,739	73	21	6	1.3	22,835	64	0.47
Fallon, NV	2	2,000,367	82	14	4	1.0	4,000	42	0.05
Lemoore, CA	4	8,393,289	82	14	4	2.4	16,870	41	0.23
Mare Island, CA	5	11,182,019	75	18	7	1.6	16,840	55	0.30
Moffett Field, CA	8	26,695,656	74	19	7	0.1	18,280	122	0.72
Novato (Hamilton), CA	5	9,677,375	76	17	7	−1.5	19,500	41	0.26
Stockton, CA	2	3,468,126	77	18	8	−0.7	7,422	39	0.09
Treasure Island, CA	3	3,563,943	76	18	6	−7.2	9,696	31	0.10
Division Totals		**$82,493,514**	**77%**	**17%**	**6%**	**0.3%**	**115,443**	**$60**	**2.22%**

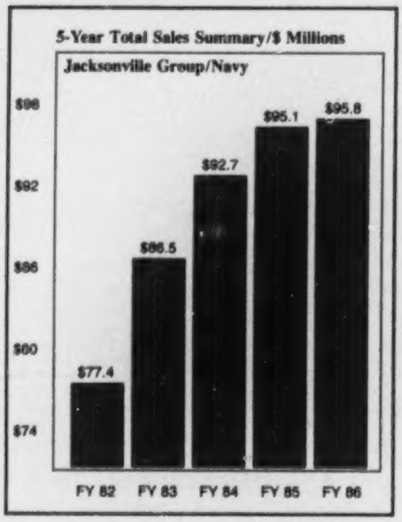
/a Less than 0.1%.
n/a Totals not meaningful for comparison purposes.
* Data not available.

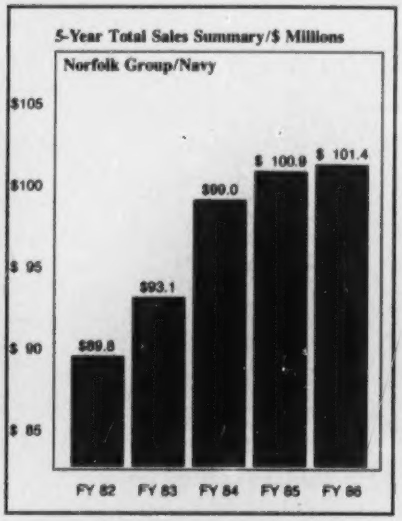
Store classes for Navy commissaries are based upon total average monthly sales, as follows:

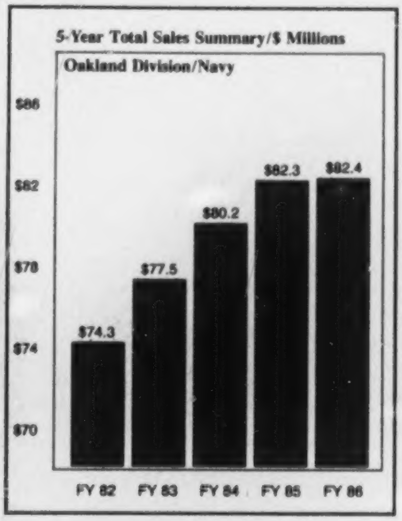
Class 1 Up to $100,000
Class 2 $100,001–$300,000
Class 3 $300,001–$500,000
Class 4 $500,001–$750,000
Class 5 $750,001–$1,000,000
Class 6 $1,000,001–$1,500,000
Class 7 $1,500,001–$2,000,000
Class 8 Over $2,000,000

Notes: All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY86 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data. Details may not add to 100 percent due to rounding.

Navy Commissary Sales—FY86

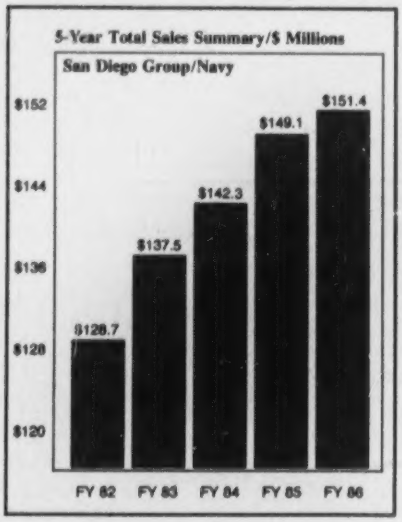






San Diego Group/Navy

Store	Store Class	Total Store $ Sales	% of Store Total: Grocery	% of Store Total: Meat	% of Store Total: Produce	Total Sales % Change vs. FY85	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
China Lake, CA	2	2,778,981	78	16	6	3.3	3,927	59	0.07
El Centro, CA	1	994,179	75	19	6	5.6	2,720	30	0.03
Imperial Beach, CA	2	2,652,056	73	20	7	*	38,600	6	0.07
Long Beach, CA	7	22,998,430	73	21	6	−1.5	26,800	72	0.62
Miramar, CA	8	45,903,666	75	18	7	2.8	38,600	99	1.24
North Island, CA	6	13,665,141	75	18	7	−8.0	14,415	79	0.37
Port Hueneme, CA	6	13,733,002	74	20	6	−1.0	16,700	69	0.37
Point Mugu, CA	2	3,349,517	78	16	6	−4.9	7,520	37	0.09
San Diego NS, CA	8	36,845,513	75	19	6	0.8	32,590	94	0.99
San Diego NTC, CA	4	8,484,637	78	15	7	−3.7	13,238	53	0.23
Group Totals		**$151,405,122**	**75%**	**18%**	**6%**	**1.5%**	**195,110**	**$65**	**4.08%**
CONUS Navy Totals		**$652,148,556**	**76%**	**18%**	**6%**	**0.5%**	**874,658**	**$62**	**17.56%**



/a Less than 0.1%.
n/a Totals not meaningful for comparison purposes.
* Data not available.

Store classes for Navy commissaries are based upon total average monthly sales, as follows:

Class 1	Up to $100,000
Class 2	$100,001-$300,000
Class 3	$300,001-$500,000
Class 4	$500,001-$750,000
Class 5	$750,001-$1,000,000
Class 6	$1,000,001-$1,500,000
Class 7	$1,500,001-$2,000,000
Class 8	Over $2,000,000

Notes: All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY86 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data. Details may not add to 100 percent due to rounding.

BELIEVE IT OR NOT!

Do you know which are the 25 CONUS military commissaries reporting the highest FY86 total store sales? They are:

1. Ft. Belvoir, VA ($55,268,182)
2. Ft. Hood, TX ($54,586,566)
3. Ft. Bragg, NC ($53,351,580)
4. Ft. Bliss, TX ($50,184,368)
5. MacDill AFB, FL ($49,518,802)
6. Carswell AFB, TX ($47,423,528)
7. McGuire AFB, NJ ($46,650,582)
8. Miramar, CA ($45,903,666)
9. McChord AFB, WA ($45,384,711)
10. Wright-Patterson AFB, OH ($41,062,331)
11. Lackland AFB, TX ($40,757,203)
12. Ft. Lewis, WA ($40,700,291)
13. Little Creek, VA ($39,489,157)
14. Randolph AFB, TX ($38,859,875)
15. Ft. Benning, GA ($38,745,420)
16. Barksdale AFB, LA ($37,345,703)
17. Andrews AFB, MD ($37,596,460)
18. Ft. Campbell, KY ($37,374,699)
19. Nellis AFB, NV ($37,094,958)
20. San Diego NS, CA ($36,845,513)
21. Ft. Ord, CA ($36,582,014)
22. Langley AFB, VA ($35,945,829)
23. Ft. Sam Houston, TX ($35,762,774)
24. Tinker AFB, OK ($34,998,276)
25. Lowry AFB, CO ($34,682,586)

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Navy Commissary Sales—FY86

OVERSEAS

Naples Region/Navy

Store	Store Class	Total Store $ Sales	% of Store Total Grocery	% of Store Total Meat	% of Store Total Produce	Total Sales % Change vs. FY85	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
La Maddalena	1	993,198	89	11	0	4.0	1,500	55	0.10
Naples	4	7,205,774	83	13	4	1.9	6,804	88	0.71
Sigonella	2	3,978,577	83	13	4	18.6	9,025	37	0.39
Region Totals		**$12,177,549**	**85%**	**12%**	**3%**	**7.5%**	**17,329**	**$59**	**1.20%**

Pearl Harbor Region/Navy

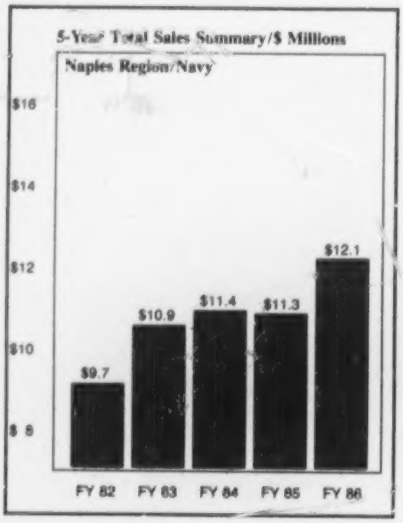
Store	Store Class	Total Store $ Sales	% of Store Total Grocery	% of Store Total Meat	% of Store Total Produce	Total Sales % Change vs. FY85	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Barbers Point, HI	4	8,718,759	74	17	9	2.8	9,660	75	0.86
Lualualei, HI	1	809,351	80	14	6	−12.0	4,009	17	0.08
Pearl Harbor, HI	8	51,681,265	76	16	8	−2.9	24,641	175	5.09
Region Totals		**$61,209,375**	**77%**	**16%**	**8%**	**−2.2%**	**38,310**	**$133**	**6.02%**

/a Less than 0.1%.
n/a Totals not meaningful for comparison purposes.
* Data not available.

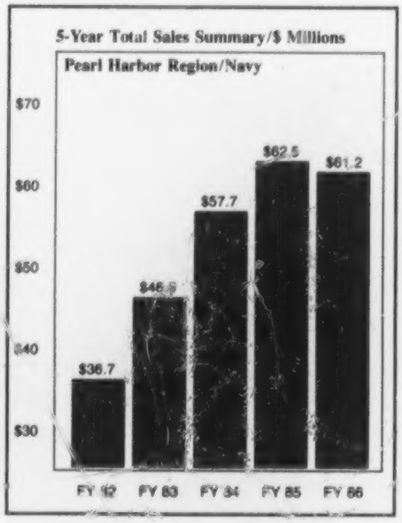
Store classes for Navy commissaries are based upon total average monthly sales, as follows:

Class 1 Up to $100,000	Class 3 $300,001-$500,000	Class 5 $750,001-$1,000,000	Class 7 $1,500,001-$2,000,000
Class 2 $100,001-$300,000	Class 4 $500,001-$750,000	Class 6 $1,000,001-$1,500,000	Class 8 Over $2,000,000

Notes: All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY86 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data. Details may not add to 100 percent due to rounding.



5-Year Total Sales Summary/$ Millions



5-Year Total Sales Summary/$ Millions

Navy Commissary Sales—FY86

Subic Bay Region/Navy

Store	Store Class	Total Store $ Sales	% of Store Total Grocery	Meat	Produce	Total Sales % Change vs. FY85	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
San Miguel, PI	2	1,352,417	78	16	6	6.3	2,514	45	0.13
Subic Bay, PI	5	11,448,679	81	12	7	2.5	7,032	136	1.13
Region Totals		**$12,801,096**	**80%**	**14%**	**6%**	**2.9%**	**9,546**	**$112**	**1.26%**

United Kingdom Region/Navy

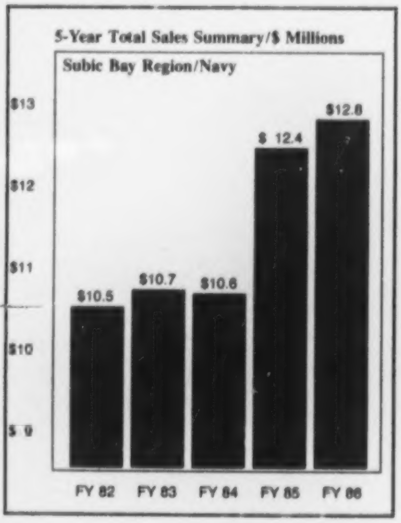
Store	Store Class	Total Store $ Sales	% of Store Total Grocery	Meat	Produce	Total Sales % Change vs. FY85	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Edzell, Scotland	1	1,167,610	78	15	7	7.6	3,474	28	0.11
Holy Loch, Scotland	3	4,436,052	81	14	5	6.5	4,841	76	0.44
Region Totals		**$5,603,662**	**80%**	**15%**	**6%**	**6.7%**	**8,315**	**$56**	**0.55%**

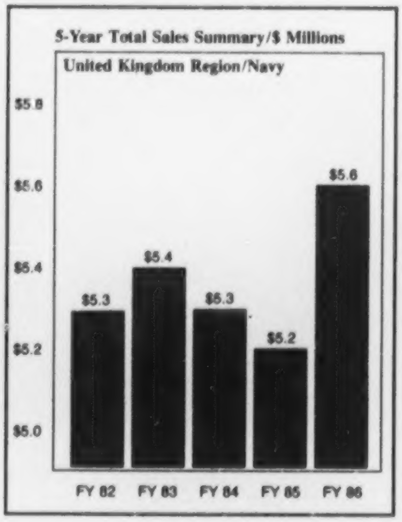
/a Less than 0.1%.
n/a Totals not meaningful for comparison purposes.
* Data not available.

Store classes for Navy commissaries are based upon total average monthly sales, as follows:

Class 1	Up to $100,000
Class 2	$100,001-$300,000
Class 3	$300,001-$500,000
Class 4	$500,001-$750,000
Class 5	$750,001-$1,000,000
Class 6	$1,000,001-$1,500,000
Class 7	$1,500,001-$2,000,000
Class 8	Over $2,000,000

Notes: All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY86 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data. Details may not add to 100 percent due to rounding.





BELIEVE IT OR NOT!

Of the CONUS military commissaries for each service, which reported the highest FY86 total store increase? They are:

1. **Navy's Kings Bay, GA (+79.3%)**
2. **Air Force's Holbrook AFB, AZ (+25.1%)**
3. **Army's Ft. Drum, NY (+24.2%)**
4. **Marine Corps' Barstow, CA (+13.7%)**

Which 5 U.S. States reported the largest DoD totals for FY86 military commissary sales? They are:

1. **California ($594,013,586)**
2. **Texas ($381,240,612)**
3. **Virginia ($329,726,869)**
4. **Florida ($266,328,694)**
5. **Georgia ($159,972,396)**

Navy Commissary Sales—FY86

Yokosuka Region/Navy

Store	Store Class	Total Store $ Sales	% of Store Total: Grocery	Meat	Produce	Total Sales % Change vs. FY85	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Atsugi, Japan	2	2,999,276	83	12	5	15.0	6,326	40	0.30
Sasebo, Japan	1	1,183,960	81	14	5	28.9	3,208	31	0.12
Yokosuka, Japan	4	10,492,127	76	17	7	15.0	14,600	60	1.03
Region Totals		**$14,675,363**	**80%**	**14%**	**6%**	**16.2%**	**24,134**	**$51**	**1.44%**

/a Less than 0.1%.
n/a Totals not meaningful for comparison purposes.
* Data not available

Store classes for Navy commissaries are based upon total average monthly sales, as follows:

Class 1 Up to $100,000	Class 3 $300,001-$500,000	Class 5 $750,001-$1,000,000	Class 7 $1,500,001-$2,000,000
Class 2 $100,001-$300,000	Class 4 $500,001-$750,000	Class 6 $1,000,001-$1,500,000	Class 8 Over $2,000,000

Notes: All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY86 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data. Details may not add to 100 percent due to rounding.

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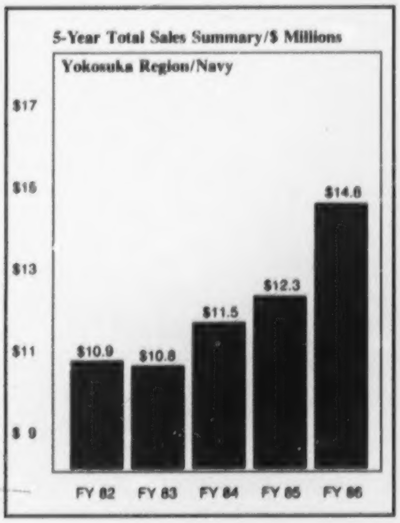
5-Year Total Sales Summary/$ Millions

BELIEVE IT OR NOT!

Do you know which are the 20 *overseas* military commissaries reporting the highest FY86 total store sales? They are:

1. **Pearl Harbor, HI ($51,681,265)**
2. **Yongsan, Korea ($32,314,070)**
3. **Hickam AFB, HI ($31,150,185)**
4. **Schofield Barracks, HI ($30,829,102)**
5. **Clark AB, PI ($28,241,671)**
6. **Kadena AB, Okinawa ($25,374,942)**
7. **Elmendorf AFB, AK ($24,952,364)**
8. **Ramstein AB, FRG ($23,697,304)**
9. **Ft. Buchanan, Puerto Rico ($22,228,408)**
10. **Corozal, Panama ($20,822,883)**
11. **Osan AB, Korea ($18,480,099)**
12. **Frankfurt, FRG ($18,028,881)**
13. **Guam ($16,844,530)**
14. **Andersen AFB, Guam ($16,224,552)**
15. **Fuerth, FRG ($16,144,677)**
16. **Vogelweh, FRG ($15,998,898)**
17. **Weisbaden, FRG ($15,214,692)**
18. **RAF Lakenheath, UK ($14,547,616)**
19. **Yokota AB, Japan ($14,165,522)**
20. **Heidelberg, FRG ($14,088,751)**

Navy Commissary Coupon Redemptions—FY86

	Number	% Share Worldwide	$ Value	% Share Worldwide
CONUS	30,816,530	98.5	9,645,376	98.7
Overseas	469,681	1.5	131,575	1.3
Worldwide Totals	**31,286,211**	**100.0%**	**$9,776,951**	**100.0%**

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Navy Commissary Sales—FY86

Stand-Alone Stores/Navy

Store	Store Class	Total Store $ Sales	% of Store Total			Total Sales % Change vs. FY85	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
			Grocery	Meat	Produce				
Adak, AK	3	3,765,392	76	15	9	1.0	8,480	37	0.37
Argentia, Newfoundland	1	659,840	81	13	6	−1.4	6,726	8	0.06
Bermuda	3	3,974,396	78	15	7	1.2	5,607	59	0.39
Chinhae, Korea	1	470,984	82	15	3	16.6	2,400	16	0.05
Exmouth, Australia	1	507,760	76	17	7	−6.7	3,077	14	0.05
Guam	7	16,844,530	77	17	6	−10.6	15,303	92	1.66
Guantanamo Bay	3	5,399,691	75	16	9	6.8	8,100	56	0.53
Keflavik, Iceland	3	3,883,639	78	15	7	3.7	7,784	42	0.38
Roosevelt Roads, PR	4	7,797,612	77	17	6	2.2	9,440	69	0.77
Rota, Spain	3	6,042,671	84	13	3	9.3	8,716	58	0.59
Stand-Alone Stores' Totals		**$49,346,515**	**n/a**	**n/a**	**n/a**	**n/a**	**75,633**	**$54**	**4.86%**
Overseas Navy Totals		**$155,813,560**	**78%**	**16%**	**6%**	**1.5%**	**168,367**	**$77**	**15.33%**
Worldwide Navy Totals		**$807,962,116**	**76%**	**17%**	**7%**	**0.6%**	**1,047,981**	**$64**	**17.07%**

/a Less than 0.1%.
n/a Totals not meaningful for comparison purposes.
* Data not available.

Store classes for Navy commissaries are based upon total average monthly sales, as follows:

Class 1	Up to $100,000	Class 3	$300,001-$500,000	Class 5	$750,001-$1,000,000	Class 7	$1,500,001-$2,000,000
Class 2	$100,001-$300,000	Class 4	$500,001-$750,000	Class 6	$1,000,001-$1,500,000	Class 8	Over $2,000,000

Notes: All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY86 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data. Details may not add to 100 percent due to rounding.

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Military Distributors since 1955
Distributors of frozen, chilled, and dry items to military commissaries and exchanges in Southern California and Nevada.

FLASH STEAK COMPANY, INC.

7959 Paramount Boulevard, Pico Rivera, CA 90660 (213) 949-2558 Contact: Chris M. Sanchez (15)

All-Service Commissary Sales by Geographic Locations

Country

	DoD Total	% of DoD	Air Force	Army	Navy	USMC
Australia	507,760	0.07	–	–	507,760	–
Azores	4,894,012	0.65	4,894,012	–	–	–
Belgium	6,439,111	0.85	259,110	6,180,001	–	–
Bermuda	3,974,396	0.52	–	–	3,974,396	–
Canada	659,840	0.09	–	–	659,840	–
Cuba	5,399,691	0.71	–	–	5,399,691	–
Egypt	1,493,774	0.20	–	1,493,774	–	–
Germany	373,315,134	49.25	81,760,245	291,554,889	–	–
Greece	6,901,264	0.91	6,901,264	–	–	–
Iceland	3,883,639	0.51	–	–	3,883,639	–
Italy	27,342,843	3.61	6,937,641	8,227,653	12,177,549	–
Japan	94,646,490	12.49	70,182,996	6,729,071	14,675,363	3,059,060
Korea	59,700,576	7.88	18,480,099	40,749,493	470,984	–
Netherlands	8,367,646	1.10	3,787,943	4,579,703	–	–
Norway	1,004,243	0.13	1,004,243	–	–	–
Panama	31,522,028	4.16	–	31,522,028	–	–
Philippines	41,042,767	5.41	28,241,671	–	12,801,096	–
Saudi Arabia	4,260,838	0.56	–	4,260,838	–	–
Spain	17,820,030	2.35	11,777,359	–	6,042,671	–
Turkey	9,329,737	1.23	9,329,737	–	–	–
United Kingdom	55,559,651	7.33	49,955,989	–	5,603,662	–
Totals	**$758,065,470**	**100.0%**	**$293,512,309**	**$395,297,450**	**$66,196,651**	**$3,059,060**

State

	DoD Total	% of DoD	Air Force	Army	Navy	USMC
Alabama	90,342,684	2.27	32,559,607	57,783,077	–	–
Alaska	59,409,993	1.50	33,452,617	22,191,984	3,765,392	–
Arizona	102,849,490	2.59	77,669,915	18,784,911	–	6,394,664
Arkansas	36,530,895	0.92	36,530,895	–	–	–
California	594,013,586	14.95	233,073,604	68,794,186	231,898,269	60,247,527
Colorado	122,511,117	3.08	78,187,641	44,323,476	–	–
Connecticut	22,630,864	0.57	–	–	22,630,864	–
Delaware	18,066,847	0.45	18,066,847	–	–	–
District of Columbia	50,903,757	1.28	20,453,432	30,450,325	–	–
Florida	266,328,694	6.70	171,750,694	–	94,578,000	–
Georgia	159,972,396	4.03	29,773,124	119,297,735	5,310,171	5,591,366
Guam	33,069,082	0.83	16,224,552	–	16,844,530	–
Hawaii	135,727,534	3.42	31,150,185	30,829,102	61,209,375	12,538,872
Idaho	11,261,147	0.28	11,261,147	–	–	–
Illinois	67,121,119	1.69	40,478,870	26,642,249	–	–
Indiana	41,216,411	1.04	8,938,246	16,905,307	15,372,858	–
Iowa	–	–	–	–	–	–
Kansas	55,433,654	1.40	15,293,985	40,139,669	–	–
Kentucky	73,126,234	1.84	–	73,126,234	–	–
Louisiana	81,100,664	2.04	49,478,158	21,435,986	10,186,520	–
Maine	17,812,150	0.45	8,376,566	–	9,435,584	–
Maryland	109,960,240	2.77	37,596,460	57,115,230	15,248,550	–
Massachusetts	34,731,083	0.87	18,670,906	16,060,177	–	–
Michigan	29,559,677	0.74	17,479,646	12,080,031	–	–
Minnesota	–	–	–	–	–	–
Mississippi	51,878,662	1.31	42,634,620	–	9,244,042	–
Missouri	29,774,489	0.75	10,396,543	19,377,946	–	–
Montana	11,624,997	0.29	11,624,997	–	–	–
Nebraska	31,219,629	0.79	31,219,629	–	–	–
Nevada	39,592,363	1.00	37,591,996	–	2,000,367	–
New Hampshire	19,259,935	0.48	19,259,935	–	–	–
New Jersey	67,624,570	1.70	46,650,582	18,146,986	2,827,002	–
New Mexico	55,334,572	1.39	51,666,191	3,668,381	–	–
New York	69,542,023	1.75	26,008,442	33,092,278	10,441,303	–
North Carolina	115,663,125	2.91	15,466,004	–	53,351,580	46,845,541
North Dakota	19,045,721	0.48	19,045,721	–	–	–
Ohio	41,062,331	1.03	41,062,331	–	–	–
Oklahoma	81,612,830	2.05	49,351,048	–	32,261,832	–
Pennsylvania	40,867,448	1.03	–	32,019,752	8,847,696	–
Puerto Rico	30,026,020	0.76	–	22,228,408	7,797,612	–
Rhode Island	12,336,339	.31	–	–	12,336,339	–

	DoD Total	% of DoD	Air Force	Army	Navy	USMC
South Carolina	104,799,280	2.64	50,405,591	25,759,628	20,556,546	8,077,515
South Dakota	13,148,391	0.33	13,148,391	–	–	–
Tennessee	21,123,154	0.53	3,892,149	–	17,231,005	–
Texas	381,240,612	9.60	229,147,993	140,533,708	11,558,917	–
Utah	23,090,099	0.58	21,356,894	1,733,205	–	–
Vermont	–	–	–	–	–	–
Virginia	329,726,869	8.30	35,945,829	169,158,667	102,526,171	22,096,202
Washington	158,590,023	3.99	67,971,380	40,700,291	49,918,352	–
West Virginia	–	–	–	–	–	–
Wisconsin	–	–	–	–	–	–
Wyoming	10,947,461	0.28	10,947,461	–	–	–
Totals	**$3,972,810,267**	**100.0%**	**$1,821,260,774**	**$1,162,378,929**	**$827,378,877**	**$161,791,687**

Continued from page 111

Rank	Store/Parent Organization	Avg. Mo. Sales/SF
72	*Kitzingen, FRG/TSA*	*48*
169	Whiteman AFB, MO/ **AFCOMS**	47
170	Ft. Stewart, GA/TSA	47
73	*RAF Menwith Hill, UK/* ***AFCOMS***	*47*
74	*Baumholder, FRG/TSA*	*47*
75	*Wildflecken, FRG/TSA*	*47*
76	*Zweibrecken, FRG/TSA*	*47*
171	Chanute AFB, IL/AFCOMS	46
172	Plattsburgh AFB, NY/ **AFCOMS**	46
173	Lakehurst, NJ/Navy	46
77	*Berchtesgaden, FRG/TSA*	*46*
78	*Ludwigsburg, FRG/TSA*	*46*
174	White Sands, NM/TSA	45
175	Athens, GA/Navy	45
79	*Torrejon AB, Spain/AFCOMS*	*45*
80	*San Miguel, PI/Navy*	*45*
176	Kelly AFB, TX/AFCOMS	44
177	Corpus Christi, TX/Navy	44
81	*RAF Chicksands, UK/AFCOMS*	*44*
82	*Bindlach, FRG/TSA*	*44*
83	*Bremerhaven, FRG/TSA*	*44*
84	*Schwaebisch Gmuend, FRG/ TSA*	*44*
178	Ft. McNair, DC/TSA	43
179	Lexington, KY/TSA	43
180	Key West, FL/Navy	43
85	*Ansbach, FRG/TSA*	*43*
181	K.I. Sawyer AFB, MI/ **AFCOMS**	42
182	Vance AFB, OK/AFCOMS	42
183	Edgewood Arsenal, MD/TSA	42
184	Philadelphia, PA/Navy	42
185	Fallon, NV/Navy	42
186	Gulfport, MS/Navy	42
187	Whiting Field, FL/Navy	42
188	New River, NC/USMC	42
86	*RAF Fairford, UK/AFCOMS*	*42*
87	*Keflavik, Iceland/Navy*	*42*
189	Lemoore, CA/Navy	41
190	Novato (Hamilton), CA/Navy	41
88	*Amberg, FRG/TSA*	*41*
89	*Bad Nauheim, FRG/TSA*	*41*
90	*Hanau, FRG/TSA*	*41*
91	*Heilbronn, FRG/TSA*	*41*
92	*Livorno, Italy/TSA*	*41*
93	*Munich, FRG/TSA*	*41*
191	Arnold AFB, TN/AFCOMS	40
192	Wurtsmith AFB, MI/AFCOMS	40
94	*Zaragoza, Spain/AFCOMS*	*40*
95	*Misawa AB, Japan/AFCOMS*	*40*
96	*Aschaffenburg, FRG/TSA*	*40*
97	*Atsugi, Japan/Navy*	*40*
193	Stockton, CA/Navy	39
194	Meridian, MS/Navy	39
98	*San Vito AS, Italy/AFCOMS*	*39*
99	*Grafenwoehr, FRG/TSA*	*39*
195	Grissom AFB, IN/AFCOMS	38
196	San Onofre, CA/USMC	38
100	*Royal Oaks HA, Spain/* ***AFCOMS***	*38*
101	*Gelnhausen, FRG/TSA*	*38*
102	*Illesheim, FRG/TSA*	*38*
197	Point Mugu, CA/Navy	37
103	*RAF Greenham Common, UK/* ***AFCOMS***	*37*
104	*Izmir, Turkey/AFCOMS*	*37*
105	*Bad Kreuznach, FRG/TSA*	*37*
106	*Sigonella, Italy/Navy*	*37*
107	*Adak, AK/Navy*	*37*
198	Los Angeles AFB, CA/ **AFCOMS**	36
199	Cannon AFB, NM/AFCOMS	36
200	Richmond DGSC, VA/TSA	36
201	Sierra AD, CA/TSA	36
202	Yorktown, VA/Navy	36
108	*Darmstadt, FRG/TSA*	*36*
109	*Karlsruhe, FRG/TSA*	*36*
203	Laughlin AFB, TX/AFCOMS	35
204	Reese AFB, TX/AFCOMS	35
110	*Schinnen, NL/TSA*	*35*
111	*Wertheim, FRG/TSA*	*35*
112	*Crailsheim, FRG/TSA*	*34*
113	*Worms, FRG/TSA*	*34*
205	Holbrook AFB, AZ/AFCOMS	33
206	New Cumberland, PA/TSA	33
207	Charleston NS, SC/Navy	33
208	Albany, GA/USMC	33
114	*Oslo, Norway/AFCOMS*	*33*
115	*Iraklion AS (Crete)/AFCOMS*	*33*
116	*Sagamihara, Japan/TSA*	*33*
117	*Kelley Barracks, FRG/TSA*	*33*
209	Kingsville, TX/Navy	27
118	*Hellenikon AB, Greece/* ***AFCOMS***	*27*
119	*Garmisch, FRG/TSA*	*27*
210	Indian Springs Aux. Fld., NV/ **AFCOMS**	24
120	*Schwaebisch Hall, FRG/TSA*	*24*
211	Ft. Drum, NY/TSA	22
212	Cutler, ME/Navy	22
121	*RAF Wethersfield, UK/* ***AFCOMS***	*21*
122	*Bad Toelz, FRG/TSA*	*21*
213	Dugway Prov. Grnds., UT/ **TSA**	20
214	Yuma Prov. Grnds., AZ/TSA	20
215	Dahlgren, VA/Navy	20
216	Makah AFS, WA/AFCOMS	19
217	Fort Fisher AFS, NC/ **AFCOMS**	19
123	*Bad Aibling, FRG/TSA*	*19*
218	Crane, IN/Navy	18
124	*Lualualei, HI/Navy*	*17*
219	Calumet AFS, MI/AFCOMS	16
220	Port Austin AFS, MI/ **AFCOMS**	16
125	*Ankara, Turkey/AFCOMS*	*16*
126	*Chinhae, Korea/Navy*	*16*
127	*Dhahran, Saudi Arabia/TSA*	*15*
221	Kings Bay, GA/Navy	14
128	*Exmouth, Australia/Navy*	*14*
222	Gila Bend AF Aux.Fld.,AZ/ **AFCOMS**	13
129	*RAF Burtonwood, UK/* ***AFCOMS***	*13*
130	*Florennes, Belgium/AFCOMS*	*11*
223	Powell, WY/AFCOMS	8
131	*Preum AS, FRG/AFCOMS*	*8*
132	*Argentia, Newfoundland/Navy*	*8*
224	Imperial Beach, CA/Navy	6
133	*RAF Sculthorpe, UK/AFCOMS*	*6*
134	*Idar Oberstein, FRG/TSA*	*5*
135	*Jidda, Saudi Arabia/TSA*	*5*
136	*Mainz Kastel, Wh/TSA*	*4*
225	Forsyth, MT/AFCOMS	3
137	*Trier HA, FRG/AFCOMS*	*3*
226	Havre, MT/*AFCOMS*	*1*

BELIEVE IT OR NOT!

Can you name the top ten (the tenth spot with a three-way tie) overseas military commissaries that last year reported the highest average monthly dollar sales per square feet of selling space? They are:

1. **Pearl Harbor, HI ($175)**
2. **Corozal, Panama ($150)**
3. **Mainz, FRG ($139)**
4. **Subic Bay, PI ($136)**
5. **Vicenza, Italy ($123)**
6. **Hickam AFB, HI ($117)**
7. **Patch Barracks, FRG ($112)**
8. **Mannheim, FRG ($111)**
9. **Clark AB, PI ($102)**
10. **Kobbe/Howard, Panama ($102)**
11. **Ft. Buchanan, Puerto Rico ($102)**
12. **Pusan, Korea ($102)**

All-Service Commissary Store Rankings by ACV... based on FY86 Sales

Overseas stores are shown in italics. ACVs for these stores represent their share of the total combined sales of all overseas commissaries. ACVs for CONUS stores represent their share of the total combined sales of all CONUS commissaries. Accordingly, two separate rankings, one for CONUS stores and one for overseas stores, are shown for all 375 worldwide commissaries.

Parent agency or branch of service for each commissary is shown to right of store name and location.

AFCOMS–Air Force Commissary Service
NAVY–Navy Resale System
TSA–U.S. Army Troop Support Agency
USMC–U.S. Marine Corps

Data are unadjusted for number of shopping days or other factors, and are based on official but preliminary sales reports.

/a Amount is less than .01 percent.

Rank	Store/Parent Organization	ACV
1	*Peari Harbor, HI/Navy*	*5.09*
2	*Yongsan, Korea/TSA*	*3.18*
3	*Hickam AFB, HI/AFCOMS*	*3.07*
4	*Schofield Barracks, HI/TSA*	*3.03*
5	*Clark AB, PI/AFCOMS*	*2.78*
6	*Kadena AB, Okinawa/AFCOMS*	*2.50*
7	*Elmendorf AFB, AK/AFCOMS*	*2.46*
8	*Ramstein AB, FRG/AFCOMS*	*2.33*
9	*Ft. Buchanan, Puerto Rico/TSA*	*2.19*
10	*Corozal, Panama/TSA*	*2.05*
11	*Osan AB, Korea/AFCOMS*	*1.82*
12	*Frankfurt, FRG/TSA*	*1.77*
13	*Guam/Navy*	*1.66*
14	*Andersen AFB, Guam/AFCOMS*	*1.60*
15	*Fuerth, FRG/TSA*	*1.59*
16	*Vogelweh, FRG/AFCOMS*	*1.57*
17	*Weisbaden, FRG/TSA*	*1.50*
1	Ft. Belvoir, VA/TSA	1.49
2	Ft. Hood, TX/TSA	1.47
3	Ft. Bragg, NC/TSA	1.44
18	*RAF Lakenheath, UK/AFCOMS*	*1.43*
19	*Yokota AB, Japan/AFCOMS*	*1.39*
20	*Heidelberg, FRG/TSA*	*1.39*
4	Ft. Bliss, TX/TSA	1.35
5	MacDill AFB, FL/AFCOMS	1.33
21	*Butler, Okinawa/AFCOMS*	*1.32*
6	Carswell AFB, TX/AFCOMS	1.28
7	McGuire AFB, NJ/AFCOMS	1.26
8	Miramar, CA/Navy	1.24
22	*Kaneohe Bay, HI/USMC*	*1.23*
9	McChord AFB, WA/AFCOMS	1.22
23	*Mannheim, FRG/TSA*	*1.22*
24	*Giessen, FRG/TSA*	*1.16*
25	*Ft. Richardson, AK/TSA*	*1.14*
26	*Hanau, FRG/TSA*	*1.14*
27	*Subic Bay, PI/Navy*	*1.13*
10	Wright-Patterson AFB, OH/ AFCOMS	1.11
28	*Berlin (Free Zone), FRG/TSA*	*1.11*
11	Lackland AFB, TX/AFCOMS	1.10
12	Ft. Lewis, WA/TSA	1.10
29	*Rhein Main AB, FRG/AFCOMS*	*1.07*
13	Little Creek, VA/Navy	1.06
14	Randolph AFB, TX/AFCOMS	1.05
15	Ft. Benning, GA/TSA	1.04
30	*Yokosuka, Japan/Navy*	*1.03*
16	Barksdale AFB, LA/AFCOMS	1.01
17	Andrews AFB, MD/AFCOMS	1.01
18	Ft. Campbell, KY/TSA	1.01
19	Nellis AFB, NV/AFCOMS	1.00
31	*Bremerhaven, FRG/TSA*	*1.00*
20	San Diego NS, CA/Navy	.99
32	*Misawa AB, Japan/AFCOMS*	*.99*
21	Ft. Ord, CA/TSA	.98
22	Langley AFB, VA/AFCOMS	.97
23	Ft. Sam Houston, TX/TSA	.96
24	Tinker AFB, OK/AFCOMS	.94
33	*Hahn AB, FRG/AFCOMS*	*.94*
25	Lowry AFB, CO/AFCOMS	.93
34	*Augsburg, FRG/TSA*	*.93*
35	*Baumholder, FRG/TSA*	*.92*
36	*RAF Upper Heyford, UK/ AFCOMS*	*.90*
26	Patrick AFB, FL/AFCOMS	.89
27	Ft. Carson, CO/TSA	.89
28	Ft. Knox, KY/TSA	.89
29	Travis AFB, CA/AFCOMS	.88
30	Ft. Meade, MD/TSA	.88
31	Keesler AFB, MS/AFCOMS	.87
32	Ft. Sill, OK/TSA	.87
33	Bergstrom AFB, TX/AFCOMS	.86
37	*Barbers Point, HI/Navy*	*.86*
34	Davis-Monthan AFB, AZ/ AFCOMS	.85
35	Cameron Station, VA/TSA	.85
38	*Torrejon AB, Spain/AFCOMS*	*.85*
36	Offutt AFB, NE/AFCOMS	.84
39	*Eielson AFB, AK/AFCOMS*	*.84*
40	*Robinson Barracks, FRG/TSA4*	*.84*
41	*Bitburg AB, FRG/AFCOMS*	*.83*
37	Mather AFB, CA/AFCOMS	.82
38	Kirtland AFB, NM/AFCOMS	.82
42	*RAF Bentwaters, UK/AFCOMS*	*.82*
43	*Ft. Wainwright, AK/TSA*	*.82*
39	Eglin AFB, FL/AFCOMS	.81
44	*Schweinfurt, FRG/TSA*	*.81*
40	Little Rock AFB, AR/AFCOMS	.78
41	Oceana, VA/Navy	.77
45	*Roosevelt Roads, PR/Navy*	*.77*
42	McClellan AFB, CA/AFCOMS	.75
43	Luke AFB, AZ/AFCOMS	.75
44	Peterson AFB, CO/AFCOMS	.74
45	Scott AFB, IL/AFCOMS	.72
46	Moffett Field, CA/Navy	.72
46	*Wuerzburg, FRG/TSA*	*.72*
47	*Bamberg, FRG/TSA*	*.71*
48	*Naples, Italy/Navy*	*.71*
47	March AFB, CA/AFCOMS	.70
48	Jacksonville, FL/Navy	.70
49	Norton AFB, CA/AFCOMS	.69
50	Ft. Jackson, SC/TSA	.69
51	Homestead AFB, FL/AFCOMS	.68
52	Ft. Gordon, GA/TSA	.68
49	*Sagamihara, Japan/TSA*	*.66*
53	Charleston AFB, SC/AFCOMS	.65
50	*Kobbe/Howard, Panama/TSA*	*.65*
51	*Darmstadt, FRG/TSA*	*.65*
54	Walter Reed AMC, DC/TSA	.64
52	*Karlsruhe, FRG/TSA*	*.64*
55	El Toro, CA/USMC	.63
53	*Spangdahlem AB, FRG/AFCOMS*	*.63*
56	Long Beach, CA/Navy	.62
54	*RAF Alconbury, UK/AFCOMS*	*.62*
57	Ft. Gillem, GA/TSA	.61
58	Redstone Arsenal, AL/TSA	.61
59	New London, CT/Navy	.61
55	*Taegu, Korea/TSA*	*.61*
56	*Chievres, Belgium/TSA*	*.61*
60	Fairchild AFB, WA/AFCOMS	.60
61	Quantico, VA/USMC	.59
62	Camp Pendleton, CA/USMC	.59
57	*Ansbach, FRG/TSA*	*.59*
58	*Patch Barracks, FRG/TSA*	*.59*
59	*Rota, Spain/Navy*	*.59*
63	Ft. Polk, LA/TSA	.58
64	Maxwell AFB, AL/AFCOMS	.57
65	Hill AFB, UT/AFCOMS	.57
66	Ft. Myer, VA/TSA	.57
67	Orlando, FL/Navy	.57
68	Tyndall AFB, FL/AFCOMS	.56
69	Pensacola, FL/Navy	.56
70	Bolling AFB, DC/AFCOMS	.55
71	Ft. Eustis, VA/TSA	.55
72	Ft. Leavenworth, KS/TSA	.54
73	Ft. Riley, KS/TSA	.54
60	*Vicenza, Italy/TSA*	*.54*
61	*Kitzingen, FRG/TSA*	*.53*
62	*Guantanamo Bay, Cuba/Navy*	*.53*
74	Pease AFB, NH/AFCOMS	.52
75	Ft. Leonard Wood, MO/TSA	.52
76	Ft. Lee, VA/TSA	.52
77	Ft. Rucker, AL/TSA	.52
63	*Zweibrecken, FRG/TSA*	*.52*
78	Robins AFB, GA/AFCOMS	.51
79	Sheppard AFB, TX/AFCOMS	.51
64	*Aschaffenburg, FRG/TSA*	*.51*
65	*Grafenwoehr, FRG/TSA*	*.51*
66	*Munich, FRG/TSA*	*.51*
80	Vandenberg AFB, CA/AFCOMS	.50
81	Hanscom AFB, MA/AFCOMS	.50
82	Presidic of S.F., CA/TSA	.50
67	*Sembach AB, FRG/AFCOMS*	*.50*
83	Castle AFB, CA/AFCOMS	.49
84	Dover AFB, DE/AFCOMS	.49
85	Ft. Monmouth, NJ/TSA	.49
68	*Mainz, FRG/TSA*	*.49*
86	Williams AFB, AZ/AFCOMS	.48
69	*Incirlik, Turkey/AFCOMS*	*.48*
70	*Lajes Field, Azores/AFCOMS*	*.48*

Continued on page 140

BELIEVE IT OR NOT!

The *little* Air Force store at Holbrook AFB, AZ, did 25% more in sales this year than last, while the *big* store at Lackland AFB, TX saw a 10.5% gain, and overseas, the Hellenikon Branch's sales went up a whopping 45%!

At Carswell AFB, TX, the average man would need a thousand steps (or so) to cover the 50,000 square feet of floor space in AFCOMS's largest store!

Rank	Store/Parent Organization	ACV
71	*Bad Kreuznach, FRG/TSA*	*.48*
87	Norfolk, VA/Navy	.47
88	Alameda, CA/Navy	.47
72	*Pirmasens, FRG/TSA*	*.47*
89	Ft. Ben Harrison, IN/TSA	.46
90	Memphis, TN/Navy	.46
73	*Heilbronn, FRG/TSA*	*.46*
91	Ft. Huachuca, AZ/TSA	.45
92	Cherry Point, NC/USMC	.45
74	*Schinnen, NL/TSA*	*.45*
93	Dyess AFB, TX/AFCOMS	.44
94	Seattle, WA/Navy	.44
75	*Holy Loch, Scotland/Navy*	*.44*
95	Shaw AFB, SC/AFCOMS	.43
96	USAF Academy, CO/AFCOMS	.43
97	Ft. Devens, MA/TSA	.43
98	Ft. McClellan, AL/TSA	.43
99	Ft. Stewart, GA/TSA	.42
76	*Kinser, Okinawa/AFCOMS*	*.42*
77	*Fulda, FRG/TSA*	*.42*
100	McConnell AFB, KS/AFCOMS	.41
78	*Gelnhausen, FRG/TSA*	*.41*
101	Griffiss AFB, NY/AFCOMS	.40
102	Seymour Johnson AFB, NC/ AFCOMS	.40
103	Great Lakes, IN/Navy	.40
104	Beale AFB, CA/AFCOMS	.39
105	George AFB, CA/AFCOMS	.39
106	Granite City AD, IL/TSA	.39
79	*Aviano AB, Italy/AFCOMS*	*.39*
80	*Sigonella, Italy/Navy*	*.39*
81	*Bermuda/Navy*	*.39*
107	Tarawa Terrace, NC/USMC	.38
82	*Keflavik, Iceland/Navy*	*.38*
108	Chanute AFB, IL/AFCOMS	.37
109	North Island, CA/Navy	.37
110	Port Hueneme, CA/Navy	.37
83	*Camp New Amsterdam, NL/ AFCOMS*	*.37*
84	*Adak, AK/Navy*	*.37*
111	Holloman AFB, NM/AFCOMS	.36
85	*Kelley Barracks, FRG/TSA*	*.36*
86	*Neu Ulm, FRG/TSA*	*.36*
112	Edwards AFB, CA/AFCOMS	.35
113	Ellsworth AFB, SD/AFCOMS	.35
114	Portsmouth, VA/Navy	.35
115	Hadnot Point, NC/USMC	.35
116	Bangor, WA/Navy	.34
117	Whidbey Island, WA/Navy	.34
118	England AFB, LA/AFCOMS	.33
119	Selfridge AnG, MI/TSA	.33
120	Newport, RI/Navy	.33
121	Los Angeles AFB, CA/AFCOMS	.32
122	Hurlburt AFB, FL/AFCOMS	.32
123	Aberdeen Prov. Grnds., MD/TSA	.32
87	*RAF Greenham Common, UK/ AFCOMS*	*.32*
88	*Ft. Gulick, Panama/TSA*	*.32*
124	Gunter AFB, AL/AFCOMS	.31
125	Malmstrom AFB, MT/AFCOMS	.31
126	Mayport, FL/Navy	.31
89	*Riyadh, Saudi Arabia/TSA*	*.31*
127	Plattsburgh AFB, NY/AFCOMS	.30
128	Mt. Home AFB, ID/AFCOMS	.30
129	Fitzsimons AMC, CO/TSA	.30
130	Ft. Hamilton, NY/TSA	.30
131	Hunter AAF, GA/TSA	.30
132	Mare Island, CA/Navy	.30
90	*Bad Nauheim, FRG/TSA*	*.30*
91	*Atsugi, Japan/Navy*	*.30*
92	*Iwakuni, Japan/USMC*	*.30*
133	Moody AFB, GA/AFCOMS	.29
134	F.E. Warren AFB, WY/ AFCOMS	.29
93	*San Vito AS, Italy/AFCOMS*	*.29*
94	*Wildflecken, FRG/TSA*	*.29*
135	Columbus AFB, MS/AFCOMS	.28
136	Whiteman AFB, MO/AFCOMS	.28
137	Myrtle Beach AFB, SC/ AFCOMS	.28
138	Charleston NWS, SC/Navy	.28
95	*Makiminato, Okinawa/AFCOMS*	*.28*
96	*Worms, FRG/TSA*	*.28*
139	Carlile Barracks, PA/TSA	.27
140	Charleston NS, SC/Navy	.27
141	New Orleans, LA/Navy	.27
97	*Hellenikon AB, Greece/AFCOMS*	*.27*
98	*RAF Fairford, UK/AFCOMS*	*.27*
99	*Livorno, Italy/TSA*	*.27*
142	Grand Forks AFB, ND/AFCOMS	.26
143	Altus AFB, OK/AFCOMS	.26
144	Novato (Hamilton), CA/Navy	.26
145	Minot AFB, ND/AFCOMS	.25
100	*Zaragoza, Spain/AFCOMS*	*.25*
101	*RAF Chicksands, UK/AFCOMS*	*.25*
146	Grissom AFB, IN/AFCOMS	.24
147	Philadelphia, PA/Navy	.24
102	*Hellenikon Branch, Greece/ AFCOMS*	*.24*
103	*Ludwigsburg, FRG/TSA*	*.24*
148	K.I. Sawyer AFB, MI/AFCOMS	.23
149	Loring AFB, ME/AFCOMS	.23
150	West Point, NY/TSA	.23
151	Bremerton, WA/Navy	.23
152	Lemoore, CA/Navy	.23
153	San Diego NTC, CA/Navy	.23
104	*Izmir, Turkey/AFCOMS*	*.23*
154	Wurtsmith AFB, MI/AFCOMS	.22

Continued on page 142

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Continued from page 140

Rank	Store/Parent Organization	ACV
155	Goodfellow AFB, TX/AFCOMS	.22
156	Kelly AFB, TX/AFCOMS	.22
157	Ft. Sheridan, IL/TSA	.22
158	Brunswick, ME/Navy	.22
159	Annapolis, MD/Navy	.22
160	Parris Island, SC/USMC	.22
105	*Ft. Greely, AK/TSA*	*.22*
106	*Pusan, Korea/TSA*	*.22*
107	*Erlangen, FRG/TSA*	*.22*
108	*Schwaebisch Gmuend, FRG/TSA*	*.22*
161	Blytheville AFB, AR/AFCOMS	.21
162	Cannon AFB, NM/AFCOMS	.21
163	Vint Hill Farms, VA/TSA	.21
164	Ft. Monroe, VA/TSA	.21
109	*Ankara, Turkey/AFCOMS*	*.21*
110	*Goeppingen, FRG/TSA*	*.21*
111	*Illesheim, FRG/TSA*	*.21*
165	Mitchel Field, NY/Navy	.20
166	Corpus Christi, TX/Navy	.20
167	Twentynine Palms, CA/USMC	.20
168	Oakdale ASC, PA/TSA	.19
169	Oakland AB, CA/TSA	.19
170	Patuxent, MD/Navy	.19
171	Reese AFB, TX/AFCOMS	.18
172	Ft. McNair, DC/TSA	.18
173	Ft. Ritchie, MD/TSA	.18
174	Cecil Field, FL/Navy	.18
175	Brooks AFB, TX/AFCOMS	.17
176	Ft. Drum, NY/TSA	.17
177	New Cumberland, PA/TSA	.17
178	Yuma, AZ/USMC	.17
112	*Iraklion AS (Crete)/AFCOMS*	*.17*
179	Edgewood Arsenal, MD/TSA	.16
113	*RAF Menwith Hill, UK/AFCOMS*	*.16*
180	Tobyhanna AD, PA/TSA	.15
181	Ft. McPherson, GA/TSA	.15
182	Richmond DGSC, VA/TSA	.15
183	Albany, GA/USMC	.15
114	*Bad Kissingen, FRG/TSA*	*.15*
115	*Cairo, Egypt/TSA*	*.15*
116	*Wertheim, FRG/TSA*	*.15*
184	Laughlin AFB, TX/AFCOMS	.14
185	Gulfport, MS/Navy	.14
186	Vance AFB, OK/AFCOMS	.13
187	Key West, FL/Navy	.13
117	*Amberg, FRG/TSA*	*.13*
118	*Berchtesgaden, FRG/TSA*	*.13*
119	*San Miguel, PI/Navy*	*.13*
188	Ft. Irwin, CA/TSA	.12
120	*Bad Hersfeld, FRG/TSA*	*.12*
121	*Sasebo, Japan/Navy*	*.12*
189	Rock Island, IL/TSA	.11
190	Stewart ASE, NY/TSA	.11
191	Meridian, MS/Navy	.11
192	San Onofre, CA/USMC	.11
122	*Hessisch-Oldendorf, FRG/AFCOMS*	*.11*
123	*Bad Toelz, FRG/TSA*	*.11*
124	*Bindlach, FRG/TSA*	*.11*
125	*Garmisch, FRG/TSA*	*.11*
126	*Hohenfels, FRG/TSA*	*.11*
127	*Schwaebisch Hall, FRG/TSA*	*.11*
128	*Edzell, Scotland/Navy*	*.11*
193	Arnold AFB, TN/AFCOMS	.10
194	White Sands, NM/TSA	.10
195	Treasure Island, CA/Navy	.10
196	Whiting Field, FL/Navy	.10
129	*Oslo, Norway/AFCOMS*	*.10*
130	*RAF Wethersfield, UK/AFCOMS*	*.10*
131	*Bad Aibling, FRG/TSA*	*.10*
132	*Crailsheim, FRG/TSA*	*.10*
133	*La Maddalena, Italy/Navy*	*.10*
197	Stockton, CA/Navy	.09
198	Point Mugu, CA/Navy	.09
199	New River, NC/USMC	.09
200	Barstow, CA/USMC	.09
134	*Dhahran, Saudi Arabia/TSA*	*.09*
201	Scotia, NY/Navy	.08
202	Lakehurst, NJ/Navy	.08
203	Kings Bay, GA/Navy	.08
204	Yorktown, VA/Navy	.08
135	*Central Dist. Ctr., Panama/TSA*	*.08*
136	*Lualualei, HI/Navy*	*.08*
205	ARDC (Picatinny), PA/TSA	.07
206	Seneca AD, NY/TSA	.07
207	Lexington, KY/TSA	.07
208	China Lake, CA/Navy	.07
209	Imperial Beach, CA/Navy	.07
210	Athens, GA/Navy	.06
211	Beeville, TX/Navy	.06
212	Kingsville, TX/Navy	.06
137	*Royal Oaks HA, Spain/AFCOMS*	*.06*
138	*Argentia, Newfoundland/Navy*	*.06*
213	Dugway Prov. Grnds., UT/TSA	.05
214	Sierra AD, CA/TSA	.05
215	Yuma Prov. Grnds., AZ/TSA	.05
216	Fallon, NV/Navy	.05
139	*Chinhae, Korea/Navy*	*.05*
140	*Exmouth, Australia/Navy*	*.05*
141	*Preum AS, FRG/AFCOMS*	*.04*
217	Avon Park Range, FL/AFCOMS	.03
218	Dahlgren, VA/Navy	.03
219	El Centro, CA/Navy	.03
142	*Florennes, Belgium/AFCOMS*	*.03*
220	Fort Fisher AFS, NC/AFCOMS	.02
221	Cutler, ME/Navy	.02
222	Winter Harbor, ME/Navy	.02
223	Crane, IN/Navy	.02
143	*RAF Burtonwood, UK/AFCOMS*	*.02*
144	*RAF Sculthorpe, UK/AFCOMS*	*.02*
145	*Jidda, Saudi Arabia/TSA*	*.02*
224	Indian Springs Aux. Fld., NV/AFCOMS	.01
225	Port Austin AFS, MI/AFCOMS	.01
226	Makah AFS, WA/AFCOMS	.01
227	Powell/AFCOMS	.01
228	Gila Bend AF Aux.Fld.,AZ/AFCOMS	.01
229	Holbrook AFB, AZ/AFCOMS	.01
230	Camp Merrill, GA/TSA	.01
146	*Trier HA, FRG/AFCOMS*	*.01*
147	*Idar Oberstein, FRG/TSA*	*.01*
148	*Mainz Kastel, Wh/TSA*	*.01*
232	Calumet AFS, MI/AFCOMS	
233	Forsyth, MT/AFCOMS	/a
234	Havre, MT/AFCOMS	/a
150	*Comiso, Italy/AFCOMS*	*/a*

BELIEVE IT OR NOT!

Can you name the ten CONUS military commissaries that last year reported the highest average monthly dollar sales per square feet of selling space? They are:

1. **Oakland AB, CA ($194)**
2. **Ft. Belvoir, VA ($175)**
3. **Ft. Ord, CA ($168)**
4. **MacDill AFB, FL ($163)**
5. **West Point, NY ($131)**
6. **Ft. Bliss, TX ($129)**
7. **Ft. Carson, CO ($126)**
8. **Ft. Hood, TX ($124)**
9. **Moffett Field, CA ($122)**
10. **Ft. Campbell, KY ($121)**

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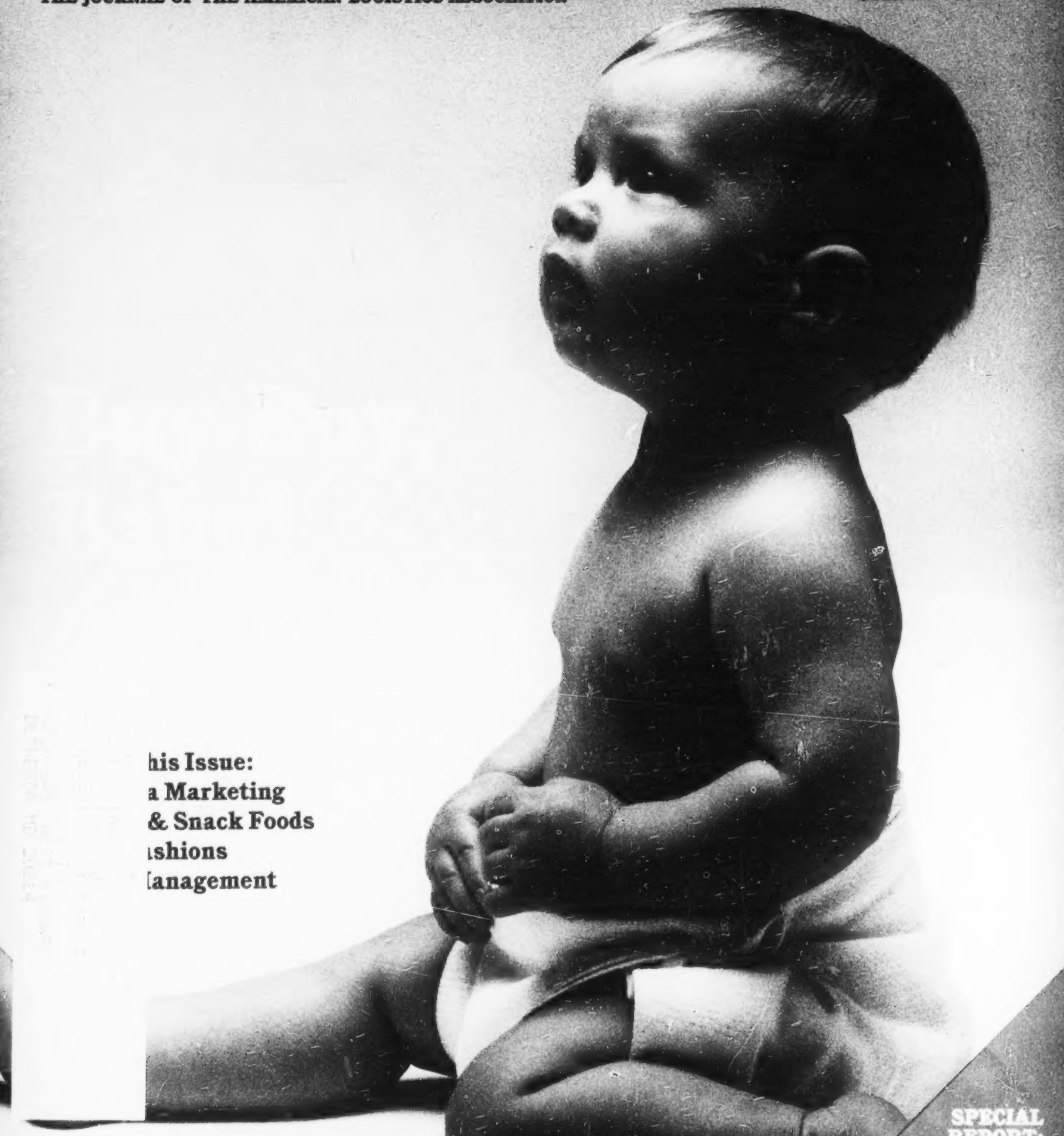

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PHOTOGRAPH BY CINDY JOHNS

The military market has always been a good one for camera makers. "The military spends more money on cameras relative to income than does the comparable civilian market," points out Steven Pfeif, military sales executive for the Eastman-Kodak U.S. Sales Division. "They travel more. The pay is good and they spend less on housing and food so they have more disposable income for high-ticket items." Mobility is important in encouraging camera use by the military, adds Robert J. Ferguson, national special markets manager for Fuji Photo Film USA. "Military people get transferred and travel a lot, so photography is a strong interest."

But what's been happening in the $17 billion U.S. camera market overall has been happening at military exchanges: there's been a declining sales pattern ever since VCR's hit in the early 1980s. The bot-

Smile! There's Action in the Camera Market

BY JILL WECHSLER

tom line has been a steady decline in camera and photo equipment sales at exchanges in recent years. Camera sales to all dealers fell 7.8 percent in 1986, according to the 1986 Industry Trends Report of the Photo Marketing Association. Money that in the past was spent on expensive cameras and lots of lenses is now going into video, points out Steve Coyte, vice president of sales at Specialized Marketing and product manager for Nikon sales to the military. "People are more interested in spending money on better televisions, VCR's, and auto sound systems."

Video and other electronic equipment has been drawing the heavy spenders away in particular from pricey SLR (single-lens reflex) cameras—once the staple of the industry. Instead of paying $200–$400 for a complete camera outfit, consumers are trading down to new, less expensive ($50–$150) lens shutter/autofocus 35mm models. At the same time the automatic features and relatively low prices of these new models are encouraging customers at the low end of the market to trade up from inexpensive "point & shoot" and disc cameras.

"Sales in the photography category peaked around 1980–81," points out senior buyer for photographic equipment at the Army & Air Force Exchange Service (AAFES) Billy Wade. He links the trend to the arrival of VCR's and video cameras at that time. "Ole" Olson, senior buyer at the Navy Resale & Services Support Office, agrees: "Video has killed the movie camera business."

Technological improvements and moderate prices have boosted these autofocus cameras to the top of the pack in the two years since they first came on strong. "Consumers have a desire to operate a simple camera," observes Wade of AAFES. "And the technological advances in the compact category are just fantastic. Now they have auto everything—and even power zoom lenses. They're remarkably easy to operate, and the results are so much better than a 110 or disc camera. They're an excellent value when you sit down and analyze it—for about $150 you get an excellent camera that can load and advance the film, rewind and have the flash go off when it's supposed to." While the top quality autofocus cameras cost $150 to $175, there are some under $100. "The Keystone 35mm does not have so many auto features," Wade points out, "but you can get a good picture."

Unfortunately, as the autofocus category has gone up, almost everything else has gone down, putting a squeeze on income from the photography department at exchanges. Photographic equipment and film sales on all U.S. military bases, domestic and overseas, dropped from $170.9 million in 1979 to $147.8 million in 1985, according to the Wolfman Report. One factor has been this switch from SLR outfits to autofocus 35mm's. While many of the new cameras are being sold, they generate less revenue per item than do SLR's and cut opportunities to sell accessories: the automatic models usually have the flash built in and don't encourage use of auxiliary lenses.

AAFES data show the trend clearly. Of the autofocus cameras, 62,900 were sold in

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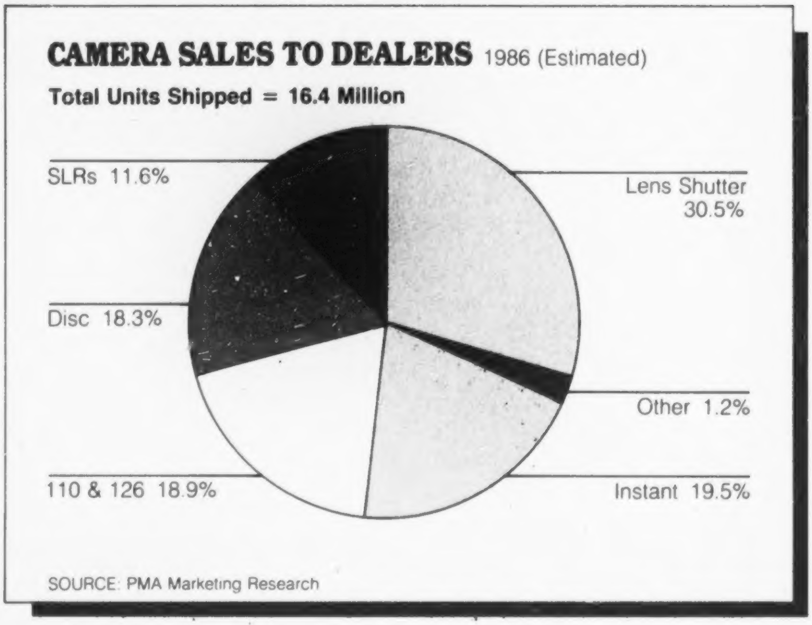

CAMERA SALES TO DEALERS 1986 (Estimated)

Total Units Shipped = 16.4 Million

SOURCE: PMA Marketing Research

1986, up from 56,200 the previous year. But SLR sales dropped from 34,200 units to 18,400 last year, disc camera sales fell by almost one-half, as did instant cameras and 110's to a lesser extent (see chart I). For all cameras and film at AAFES worldwide, volume dropped from $108.4 million in 1985 to $103.9 million in 1986. A boost in film sales kept figures on an upward swing for U.S. exchanges, but not overseas. "The trends at home and overseas are similar," points out Wade. But the interest appears to be more intense overseas for audio/video electronics. "People overseas want more at-home entertainment and use sound systems every day."

The drop in disc sales reflects a major slimming of its disc line by Kodak. "It's still a viable product, especially for young people," Wade comments, pointing to heavy rebating and promotion from Kodak that have helped maintain disc sales. "Discs were popular because they were so small and compact. But now we have 35mm with the same features, and the price points are closer together," he adds.

Fortunately, the gloomy flat-to-declining sales picture of the past five years now is showing signs of change. A rising birthrate – the 3.7 million births in 1985 was the highest since 1965 – bodes well for camera sales, according to the PMA. Promises of a sales turnaround already are appearing on several fronts. "Overall, 1986 was a good year and December one of the best months," reports Navy's Olson. Despite Kodak's exit from the instant camera field and the decline in SLR and accessory sales, NAVRESSO's camera sales grew. Last year's dollar volume jumped from $17.5 million in 1985 to $18.4 million worldwide, representing a 5.2 percent rise in camera sales worldwide, and a 5.8 percent increase in domestic sales.

"Consumers have a desire to operate a simple camera."

To some extent, this reflects a revitalization of the camera field by a surge in new products, particularly in the compact 35mm segment. "We're getting new customers in 35mm, starting with the compact," says Olson. "The manufacturers have made them foolproof. And the low-end 35mm, which start at $50, are better than the highest priced disc camera." Steve Coyte who represents Nikon sees the trend toward easy-to-use, low-cost cameras reflecting "the way the whole society is moving. People are not into large camera bags and interchangeable lenses. Sophistication in photography has peaked. Consumers want a more sporty, practical application." While Nikon is "struggling to maintain its SLR business," it also now has a varied line of one-touch cameras. Its new "fun touch" model costs $119 – $129, less than its first model, and includes a new autofocus system.

"Autofocus is where the market's going," adds Michael P. Shishkoff, marketing assistant at Canon USA Inc. "A few years ago SLR's were riding high, and manufacturers were flooding the market. But now we see no increase in SLR sales in the military market, just as there's none in the overall consumer market." Compounding the problem is the recent devaluation of the Japanese yen, putting the cost of a quality SLR, lens, camera bag and flash in the $400 – $450 range, Shishkoff points out. "At that price there are many things other than cameras for the consumer to buy."

The rising price of imported SLR's and consumer preference for autofocus models is encouraging U.S. manufacturers to enter the competition. Eastman Kodak is making waves with its new 35mm automatic camera, introduced just last year. "Kodak is really taking advantage of the situation," one of its competitors points out. "Its new 35mm camera is extremely successful and has exceeded anticipated results. It has a good price – under $100 – and a quality name. People trust a name like Kodak. If Kodak is smart it'll start to upgrade and come out with new models."

Similarly, Keystone has been actively promoting its "Clic" cameras, introduced in May 1986 in 35mm, disc and 110 formats. "This is a fashion-type camera, available in colors, that appeals mostly to women," comments Harold Witkin, manager of special markets, Keystone Camera Corp. With the 35mm priced from $39 to $44, it has been used for special promotions by both Navy and AAFES. "All our cameras are made in the U.S. in our own factories," Witkin adds. "So we do run 'Made in the USA' day promotions. But we don't get any special consideration from the military. We have to show we're competitive in price and good in delivery."

Keystone's 110 camera is "still around after 15 years and still selling quite well," says Witkin. Only a slight decline was experienced at AAFES for the inexpensive 110 and 126 "point and shoot" cameras, Wade points out. "They are still popular because of price—you can get one for $9.95, so they'll continue to be around for a while." Special promotion of its trendy "Clic" models makes Witkin optimistic about 1987. For example, the Navy recently ran a Mother's Day promotion on the 35mm Clic, and "it was priced below the catalog houses," Olson points out. Witkin is encouraged: "The year 1986 was better than 1985, and 1987 is starting off quite good," he observes.

One big surprise last year was the unexpected success of Polaroid's new Spectra instant camera. Although sales of all instant cameras fell at AAFES from 61,200 units in 1985 to 37,700 last year following an important court decision that forced Kodak to exit that field, turnaround was in sight by year-end. Polaroid's introduction in May 1986 of its new Spectra product, a more high-tech and higher-priced model, has "revitalized this entire category," comments John Gates, national account manager for worldwide military sales at Polaroid. In addition, Spectra has had a "halo effect" for the rest of the Polaroid line, he says.

A rising birthrate bodes well for camera sales.

Spectra's success, similar to the rise of the 35mm autofocus, reflects consumer desire for easy-to-use products that give quality results. "Spectra has more bells and whistles than previous Polaroids," Gates comments. "It takes better pictures, it's rectangular instead of square so you have more flexibility in taking pictures, and you can reprint off the system." Instant cameras are particularly popular with military personnel who have tours of duty all over the world, he adds: "With an instant camera you can always have your film developed."

Overall, the instant camera market is declining, observes the Navy's Olson. "The compact 35mm's and one-hour photo processing are not helping instants," he comments. Despite this, his instant camera sales were boosted by Spectra last year. "Spectra sales have exceeded my expectations," echoes Wade of AAFES. "I wasn't sure people would pay $130 to $170 for an instant camera. But I was wrong. Sales have been very good so far."

In addition to consumer interest in the new Spectra camera, Polaroid has worked to boost sales at military exchanges with more aggressive pricing and active promotion. "We've been trying to give the military exclusive prices that sets it apart from the outside trade," explains Gates. While the prices on most Polaroid products went up for 1987, "we went down for all military services," he points out. "And we think it's paying off. I see a 20 percent increase in camera and film shipments to the military this year."

CAMERA SALES IN U.S. BY AAFES

	1985	1986
SLR	$34,200	$18,400
Range finder/autofocus	56,200	62,900
Disc	82,600	44,700
110/126	55,000	46,900
Instant	61,200	37,700
All Cameras:		
Worldwide	$108,410,000	$103,920,000
Domestic	55,513,000	57,340,000

Source: Billy Wade, AAFES

Overseas sales of Polaroid products to the military also are rising due to a decision in 1985 to put a Polaroid representative in Europe assigned exclusively to the military market. "He gets Polaroid involved in local events," Gates explains, "and has helped that market significantly."

Although the bureaucratic system in the military sometimes prevents the services from reacting quickly to changing market conditions, Gates considers the military a prime candidate for promotional efforts. "You can experiment with pricing and promotions in the military market, test and evaluate programs without affecting the outside trade," he explains. While Polaroid has always offered special deals to military exchanges, this year Gates has put a special price and promotion program in place for the first time. "The services had to agree to order in certain quantities and run promotions to get such good prices for 1987. They're working with us very well in buying under this program."

Shishkoff of Canon also emphasizes that he tries to give the military good prices. "With the exchange right on the base, we have to try to induce military people not to shop outside." In the camera field, in particular, competition from outside discount stores is increasingly tough as national chains lure military customers with heavy advertising and below-cost come-on pricing. "The military increasingly has difficulty competing with retail stores on an every-

PHOTO SALES AT U.S. MILITARY BASES, 1985

Products	Domestic Sales	Overseas Sales	Worldwide Sales	Percent
Still cameras	$20,692,930	$16,246,378	$ 36,939,308	25.0%
Movie cameras	7,090,008	5,469,356	12,559,364	8.5
Photoflash equipment	5,935,821	4,850,457	10,786,278	7.3
Photo accessories	6,595,356	5,032,465	11,627,821	7.9
Slide projectors	2,803,026	2,368,477	5,171,503	3.5
Movie projectors	4,616,749	3,509,899	8,126,648	5.6
Films	31,822,594	25,654,968	57,477,562	38.8
Other	2,885,469	2,183,277	5,068,746	3.4
	$82,441,953	**$65,315,277**	**$147,757,230**	**100.0%**

SOURCE: Headquarters offices of the various exchange systems. Coast Guard exchange sales were estimated by use of the percentage distribution of sales in the Navy Exchange Camera/Photo Department. From *1986-87 Wolfman Report on the Photographic and Imaging Industry in the United States.*

day basis," points out Coyte of Specialized Marketing. Although the exchanges can offer better service and no taxes, they don't have the system to use discounts the way major discounters do, he observes. Pfeif of Kodak agrees: "While the rural bases are still very competitive, the exchanges have difficulty in cities where they're near the big discount stores."

To help the exchanges be more competitive, Kodak is looking to special promotions to lift military sales. It sells well to the Marines through its strong field sales force which can call on individual bases. And this year, for the first time, it's running a sweepstakes promotion for the military on a national scale. "We've done this before at the regional level," explains Kodak's Pfeif. But this current contest, which offers the winner a trip to Disneyland, is national and includes the Marine Corps, Navy, Army and Air Force. Running such a large-scale sweepstakes raises problems of coordination, he admits, "but we're very interested in this type of promotion, and the services are excited."

The roller-coaster ups and downs of the camera market are reflected in film sales, which is the single largest segment in the photographic field, accounting for 38 percent of sales in this category in 1985. Riding high is 35mm film, with sales boosted by the increase in sales of 35mm autofocus cameras. Holding even is 110 film, but disc film and instant film are both down considerably. For example, a $2 million drop in instant film sales at Navy exchanges was responsible for a $1 million decline in all film sales last year for this service. "If you took out the instant film, we would have had a gain," reports Olson.

> **"Autofocus is where the market's going."**

For 35mm and other films, Kodak is the leading brand. The Navy, however, also "does well with Fuji," says Olson. "It's a good secondary line, and we get terrific pricing." Fuji finds sales of its 200 speed 35mm film "are gaining momentum," adds Ferguson. "It offers more speed than the 100 plus sharpness and is becoming a popular alternative." Ferguson fnds a strong interest in the military for Fuji's multiple package units. "Packs with two or three rolls of film can be promoted as a price savings."

Fuji also is attracting attention with its new "Quick Snap" disposable camera just now in the market. This new disposable uses ISO 400 35mm film and carries a $9.95 suggested retail price. Kodak also has a new disposable camera with 110 film that, like the Fuji, can only be used outdoors. "This is a 'niche camera'," comments Pfeif. "It's for the person who forgot his camera and just wants to take a few pictures." Fuji considers its disposable camera suitable for "specialized times," such as a trip to the beach when you don't want to take along a good camera, Ferguson adds. The disposable is a "novelty item" for Olson. "People will buy one just to see what it is. But once the novelty wears off, we'll just see them in theme parks and airports. The exchanges will do well with them initially, but then sales will come down."

While a declining sales trend might trouble some buyers, AAFES' Wade finds that stiff competition from outside retailers and changes in the marketplace make his job exciting. "It seems that almost every week we find a new product on the way," he says, referring to the new 35mm automatic cameras in particular. "The R&D people are very busy. Now they're using the same expertise they've applied to traditional SLR's to the new autofocus cameras. For us buyers, the job is really challenging when you're trying to maintain sales."

For the future, Wade and others predict "a marriage between the traditional camera and video." Canon has a new camera system that takes a picture on a floppy disc that can be printed, put on a screen or transferred over phone lines. However, it costs $20,000 now, explains Shishkoff. "It will be some time before the total blending takes place," he says.

Until then, competitive marketing will be the key to success in the exchanges' camera departments. During the last 15 months, the exchange services have been coming off a slow period, observes Nikon distributor Coyte. "Now they're taking action to sharpen margins, get leaner and become more competitive." As consumers trade up and trade down, exchanges will be hard pressed to boost revenues and maintain profit margins in this field. But with new products generating excitement and an increased awareness of the need to seek out and promote good prices, the military market will strive to be where the action is for camera sales. ■

BUY-BUY, BABY!

As Baby Boomers Have Babies, Military Commissaries and Exchanges Cash In

BY MARIE KRAKOW

Do military families have more babies than civilian families? Some marketers say they do, and that it is one reason why baby and infant supplies sell so well in military commissaries and exhanges.

But according to government statistics, the mystique of higher military fertility is, well, a misconception.

People assume that generous military medical benefits and family services favor childbearing, and that frequent relocation makes military wives focus more on homemaking and children than careers. Census data, however, don't bear this out.

A report called "Military Families: Do They Differ From Their Civilian Counterparts?" says the data from the 1980 census "show only small differences in the number of children ever born for military and civilian wives."

Demographics Still Favorable

Nevertheless, the makers of diapers, baby food, infant formula, baby shampoos and other supplies for the "wet set" don't have to fret about sales prospects in commissaries and exchanges: Demographics in military families are still skewed to their products' favor in certain important respects.

For one thing, the census statistics, although they are the latest available, don't

PERCENTAGE OF MILITARY WIVES WITH YOUNGEST CHILD 0-5 YEARS

Service	Enlisted Personnel	Officers
Army	53.09%	40.04%
Navy	49.79	38.38
Marine Corps	52.03	42.76
Air Force	48.15	39.06
Total DoD	50.67	39.52

Note: The percentages listed above were derived from a spouse questionnaire answered by a sample from each of the active service branches. Although they may be representative of trends in each of the armed services, they are not exact figures for dependents of total personnel. For example, the 53.09% of enlisted Army personnel with children aged 5 or younger was based on a sample of 5,579 cases out of total personnel of 247,000.

SOURCE: Defense Manpower Data Center: "Description of Spouses of Officers And Enlisted Personnel in the U.S. Armed Forces: 1985"

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CHILDREN EVER BORN PER 1,000 WIVES ACCORDING TO WHETHER HUSBAND IS MILITARY OR CIVILIAN: 1980

Age	**Military**	**Civilian**
UNDER 25	859	836
25 TO 29	1,512	1,406
30 TO 34	1,971	2,004
35 TO 39	2,462	2,550
40 TO 44	2,689	3,046
45 TO 49	2,829	3,234
50 TO 54	2,927	3,120

Note: At the 25 to 29 age group, there is very weak evidence suggesting more children per 1,000 military wives than for civilian wives. The differences are extremely small, and after age 30 civilian wives report higher numbers of children ever born than military wives.

SOURCE: Center For Demographic Studies, U.S. Bureau of the Census, 1984: "Military Families: Do They Differ From Their Civilian Counterparts?"

include figures for 1981 through 1985, a period which had the highest percentage of first-time births since the postwar baby boom.

Another consideration is that the military has a very large 18- to 40-year-old population, with about the same fertility structure as the overall population.

Right now, births in this country are still in an upward trend as the last of the baby boomers themselves continue to have children, says Dr. Salina Guber, president of Children's Market Research Inc., New York.

Births are expected to rise by about 1 percent each year at least until 1990.

While the military may not have *more* babies than civilians, they do have babies *earlier* than the general population, according to Dr. Melanie Martindale, Ph.D., demographer with the survey and market analysis division of the Defense Manpower Data Center of the Department of Defense.

Ballpark figures from DoD for fiscal 1986 indicate that active duty military personnel have nearly 1.7 million children.

In a survey taken the previous year, more than half of enlisted active duty personnel and about 40 percent of officers said they had children aged five or younger.

"More women are likely to have children before age 30 if the father is in the military," said Dr. Martindale.

"So the markets for baby products may be relatively larger for the military than for the general population."

Baby Food

The baby boom wasn't even a gleam in anyone's eye in 1928 when Gerber introduced jarred baby foods, originally packed in tins.

Now, nearly sixty years later, Gerber is still king of the category, but faces heated competition from Beech-Nut and H.J. Heinz.

However, the Department of Defense cancelled Beech-Nut's supply bulletin as of December 15, 1986. That means no Beech-Nut baby food can be sold in military commissaries or exchanges, except for inventory that was already in the system.

Ironically for Beech-Nut, which bolstered its image by promising nutritional purity, the DoD ban was in response to a federal indictment that charged the company with passing off millions of bottles of flavored sugar water as 100 percent apple juice for infants.

Beech-Nut's loss in the military will be leader Gerber's and contender Heinz' gain. By April, Gerber and Heinz replaced Beech-Nut in the Navy commissaries and a few Army commissaries.

Spokesmen from both Gerber's and Heinz said that the remaining Beech-Nut inventory in the system and the lack of reliable measurements at the commissary level made it impossible to predict which would gain the most market shares.

Beech-Nut, which was bought by Nestle SA in 1979, began shaking things up by reformulating its entire line with a "low or no" approach to added salt, sugar, starch, and preservatives.

Although Gerber's food is color-coded, Beech-Nut took it one step further in 1984: it offered number-coded foods tailored for specific ages and stages of development.

Meanwhile, H.J. Heinz carved out a special niche for itself by introducing a line of dry instant baby foods as an addition to its line of jarred baby foods.

The Heinz instants offered convenience, better portion control to eliminate

Beech-Nut Settles Suit

As of press time, Beech-Nut Nutrition Corp., accused of selling millions of bottles of sugar water as pure apple juice for babies, has settled a class-action suit for $7.5 million.

The settlement, given preliminary approval by a federal judge, would provide $2.5 million in Beech-Nut products to retailers and a $5 million cash fund for consumers. Indictments against the company and two executives still are pending. ■

refrigerated leftovers – and safety. For 1986 was the same year that Gerber was hurt by a tampering incident in which hundreds of consumers claimed to have found splinters of glass in jars of Gerber's.

As a result of the aggressive moves by Beech-Nut and Heinz, baby food became the third largest growth category in supermarkets in 1985.

Gerber, which had a 67 percent market share before the glass shards incident, fell back temporarily to 53 percent and spent most of last year making a comeback. In September, Gerber joined the other baby food companies with a no-additives line called First Foods.

Unlike Beech-Nut's Stages, First Foods offers nine varieties of pure fruits and vegetables targeted to the beginning eater. It counters waste-control advantages of the Heinz Instants by featuring tiny serving sizes of only 2.5 ounces, and is 3–6 times smoother.

The introduction of First Foods into both the civilian and military markets has been "spectacular," with sales running 2½ to 3 times greater than projections, according to Fred Panyard, military sales manager for Gerber Products.

Infant Formula

Although the baby food category is in an upward trend in Army commissaries, infant formula is growing even faster, according to Bill Mehler, Commissary Management Specialist with the Merchandising and

DEPARTMENT OF DEFENSE ACTIVE DUTY MILITARY PERSONNEL AND THEIR DEPENDENTS

	Military Personnel Excluding Cadets		Dependents of Active Duty Military Personnel					
Component/ Personnel	**Total Number**	**Number Males**	**Total Number**	**Spouses**	**Children**	**Parents & Others**	**Number Per Military Male**	**Number Per Family Unit**
ARMY								
Officers	109,757	98,494	207,945	74,858	121,777	11,310	2.11	2.78
Enlisted	666,668	597,517	942,455	338,124	550,045	54,286	1.58	2.79
Total	776,425	696,011	1,150,400	412,982	671,822	65,596	1.65	2.79
NAVY								
Officers	72,051	64,791	121,704	50,157	71,217	330	1.88	2.43
Enlisted	504,389	457,593	552,675	241,668	308,091	2,916	1.21	2.29
Total	576,440	522,384	674,379	291,825	379,308	3,246	1.29	2.31
MARINE CORPS								
Officers	20,199	19,556	37,177	14,412	22,705	60	1.90	2.58
Enlisted	178,615	169,369	169,324	73,246	95,538	540	1.00	2.31
Total	198,814	188,925	206,501	87,658	118,243	600	1.09	2.36
AIR FORCE								
Officers	109,048	96,671	205,468	82,506	122,017	945	2.13	2.49
Enlisted	494,666	433,972	681,269	302,284	376,041	2,944	1.57	2.25
Total	603,714	530,643	886,737	384,790	498,058	3,889	1.67	2.30
DOD								
Officers	311,055	279,512	572,294	221,933	337,716	12,645	2.05	2.58
Enlisted	1,844,338	1,658,451	2,345,723	955,322	1,329,715	60,686	1.41	2.46
Total	2,155,393	1,937,963	2,918,017	1,177,255	1,667,431	73,331	1.51	2.48

SOURCE: Department of Defense report on military dependents, "Selected Manpower Statistics, Fiscal Year 1986."

Marketing Branch of the U.S. Army Troop Support Agency.

The Similac line, by Ross Laboratories, is the best selling formula in the Army commissaries, accounting for almost 46 percent of unit volume for 1986.

Mead Johnson's Enfamil was second, with 25 percent of sales volume. Isomil (Ross) followed with 16 percent; then SMA and ProSoybee (Mead Johnson) with 5 percent each.

According to Ross Laboratories, infant formula sales in supermarket baby departments return more dollars per linear foot than diapers and baby food combined.

The company recommends stocking cases of formula next to cans to increase sales by up to 50 percent, since more than half of all shoppers purchase formula by the case.

Bill Mehler said that within the formula category, dry powdered formula that the consumer must mix with water is doing especially well, with a 17 percent growth rate in 1986. In 1985, powdered formulas grew 25 percent.

Part of the success of the powders may be due to the new popularity in the commissaries of the instant baby foods introduced by Heinz, Mehler said.

One of the problems the Army has in stocking infant formula to suit consumer demands is that when a base hospital overseas gets a new pediatrician with a formula brand preference, it inevitably creates a distortion in the commissary, Mehler noted.

The overseas military population accounts for about half the resale market for formula. Since most Army wives overseas

TOP TEN BEST-SELLING BABY FOODS IN AIR FORCE AND NAVY COMMISSARIES AND ARMY AND AIR FORCE EXCHANGES

AFCOMS	NAVRESSO	AAFES
1. Heinz Banana With Tapioca	Gerber Strained Banana	Similac Formula W/Iron RTS 32 oz.
2. Heinz Applesauce	Gerber Strained Applesauce	Enfamil Formula W/Iron 13 oz.
3. Heinz Peaches	Gerber Apple Juice, 4.5 oz.	Isomil Formula, 32 oz.
4. Heinz Bananas	Gerber Ast. Juice, 6 Pk.	Similac W/Iron, 13 oz.
5. Heinz Carrots	Gerber Apple Juice, 6 Pk.	Similac RTS, 32 oz.
6. Gerber Banana	Gerber Strained Peaches	Enfamil W/Iron, 32 oz.
7. Heinz Vegetable & Ham	Gerber Strained Pears	Enfamil Concentrate
8. Heinz Green Beans	Gerber Sweet Potatoes	Gerber Ast. Juice, 4 Pk.
9. Heinz Apricots	Gerber Apple Juice, 8 oz.	Gerber Strained Ap. Juice, 4.2 oz.
10. Heinz Vegetable Egg Noodle & Chicken	Gerber Strained Apricots	Similac Concentrate, 13 oz.

Note: AFCOMS reports that its ten top sellers above had an annual dollar volume of $6,216.00. NAVRESSO reports that its total baby food sales in Navy commissaries come to $7,370,520. AAFES reported total baby food sales of $2,200,200. No figures were available from USATSA for Army commissary sales of baby food.

use the doctors at base hospitals, a pediatrician who insists on a certain brand of infant formula can wreak havoc on the supply system, he said.

Projections for continued growth of infant formula sales are excellent. Most doctors and nutritionists now recommend that babies not be fed solid foods until they are six months old and not drink ordinary cow's milk until they are a year old.

That means formula is a key item during a baby's first year. Even mothers who breast feed frequently give their babies formula as a supplement or when baby is being cared for by its father or baby sitter.

According to Ross Laboratories, 90 percent of all mothers feed formula to their babies before age one.

Disposable Diapers

"Right now the whole disposable diaper segment is in transition as the companies introduce new versions of old products. There's a lot of expansion in the category; it's a growing phase," said TSA's Mehler.

Earl Pool, manager of military sales for Procter & Gamble, which makes the Pampers and Luvs, said today's diapers are going from thicker, less-absorbent versions to ultra-thin models that hold more moisture.

"This has split the market into two segments and it's hard to tell which is more popular with the military."

Unlike baby food, which is sold primarily in commissaries, or non-food baby supplies, which are sold in greater variety in exchanges, disposable diapers make up a big part of the baby departments in *both* commissaries and exchanges.

In fact, makers of other baby products are beginning to complain that they're losing shelf space to ever-bigger boxes of diapers.

"It's my observation that baby food departments are shrinking in the military on a store-by-store basis as the commissaries and exchanges have had to allocate more space for diapers—something's got to give," said Al Skorupka, military sales manager at H.J. Heinz.

The Army and Air Force Exchange Service (AAFES) launched its own brand of disposable diapers in exchanges in June. The new diapers will be manufactured by Johnson & Johnson and called AAFES Ultra Disposable Diapers.

TOP SELLING DISPOSABLE DIAPERS IN COMMISSARIES AND EXCHANGES

ARMY COMMISSARIES:

1. PAMPERS line from Procter & Gamble. Including new Ultra Pampers, accounts for 37% of diaper sales.
2. KLEENEX HUGGIES from Kimberly-Clark, 25% of sales.
3. LUVS from Procter & Gamble.

NAVY COMMISSARIES:

1. PAMPERS, followed very closely by
2. HUGGIES

AIR FORCE COMMISSARIES:

1. PAMPERS, Ultra, Medium—96

NAVY EXCHANGES:

1. PAMPERS and HUGGIES running neck and neck

ARMY & AIR FORCE EXCHANGES:

1. HUGGIES, Toddler Size

SOURCES: Directorate of Commissary Operations, U.S. Army Troop Support Agency; Air Force Commissary Service; Army and Air Force Exchange Service; Navy Resale & Services Support Office.

AAFES has been emphasizing its own brand product line this year in marketing baby products to increasingly selective and value-conscious military consumers and has been very successul.

In fact, the three best-selling non-food baby products in AAFES exchanges have been AAFES' own brand of baby oil, cotton swabs and baby wipes. AAFES is betting its new disposable diapers will build on the growing popularity of these AAFES brands.

Toiletries and Supplies

Toiletries are probably the best selling non-food baby products in the military resale system. They are sold in commissaries, with Johnson & Johnson and Mennen products leading in sales of name brand products and AAFES brands leading in Army and Air Force exchanges.

Baby toiletries sell about equally in both commissaries and exchanges, according to Steve Yarvis, director of special markets for the Mennen Co., which sells the Baby Magic family of lotions, baths, powders, baby oils and shampoos to the military.

Commissaries severely limit the shelf space for other non-food baby supplies, however.

"Most of the non-food items sold in commissaries, are restricted to things used for feeding a baby; there is not the wide range of general merchandise we sell in civilian supermarkets," said Gerber Products' Fred Panyard.

Besides baby food, Gerber markets a wide range of baby products including feeding items, toys, clothing and accessories such as car seats, walkers, high chairs, carriages, playpens and more.

Like other companies offering this type of merchandise to the military, Gerber sells these items in the exchanges only.

TOP TEN BEST-SELLING NON-FOOD BABY PRODUCTS IN AIR FORCE COMMISSARIES AND ARMY AND AIR FORCE EXCHANGES

AFCOMS	AAFES
1. Johnson's Baby Powder, 14 oz.	AAFES Baby Oil
2. Mennen Baby Magic, 9 oz.	AAFES Cotton Swabs, 300
3. Johnson's Baby Shampoo, 15 oz.	AAFES Baby Wipes
4. Johnson's Baby Shampoo, 7 oz.	Q-Tips Cotton Swabs, 170; (Chesebrough-Ponds)
5. Johnson's Baby Oil, 10 oz.	Q-Tips Cotton Swabs, 88
6. Johnson's Hair Conditioner For Baby, 15 oz.	Johnson's Baby Shampoo, 7 oz.
7. Desitin Ointment	Johnson's Baby Shampoo, 15 oz.
8. Q-Tips, 170	Playtex Nurser Kit
9. Q-Tips, 300	Kessler Sleep/Play Pajama
10. Mennen Baby Lotion, 9 oz.	Carter Blanket Sleeper

SOURCE: Air Force Commissary Service and Army and Air Force Exchange Service

Promoting Baby Products

Although for the most part, baby products are merchandised to the military the same way as to the civilian population, a number of manufacturers said they are now using baby product coupons specifically for commissaries and exchanges by placing them in the military consumer magazines.

"We do not try to piggy back our civilian advertising programs to the military. We use separate advertising for that market," said Gerber's Panyard.

He said although he had no hard data to support it, he believes the usage of coupons is greater in the military than in the civilian sector, making this form of promotion very valuable.

H.J. Heinz is breaking into the military market with an indirect promotion it has used for years in the civilian sector: a label-saving program for hospitals for children.

Labels from Heinz products can be turned back to the company for six cents per label, to raise funds for specific hospital groups.

This year Heinz is making this program available through military organizations such as officers' and non-commissioned officers' wives' groups. Commissaries are being used as drop-off locations for saved labels, building brand awareness at the point of purchase and encouraging shoppers to buy more Heinz products.

"In the commissaries, we're seeing more floor displays with premiums and more refund activity. Self-liquidating promotions ("Send $5.00 and get a Teddy Bear") are also becoming more popular," said Mennen's Yarvis.

One source complained that exchanges are lagging behind the commissaries when it comes to off-shelf promotions and floor stands for baby products.

"The exchanges have to take a look at their own economic environment vis-a-vis shopping centers off base and have to have more acknowledgement of the competitive environment" regarding baby product sales, he said.

At Army and Air Force exchanges, AAFES said it is planning promotions to be tied in to National Baby Week, which will feature special prices on regularly carried items and one time buys.

In addition, the AAFES stores are creating an optional promotion called the "Twin Insurance Program." With this, military shoppers with twin babies can go to AAFES stores at selected locations and get a second baby item for half price. The twin insurance promotion applies not only to high ticket items like high chairs, but to any baby product the participating AAFES stores sells, a spokesman said.

Outlook

Baby products today tend to be very upscale, more trendy, and with higher prices than ever before.

In the baby food area, the companies are researching "gourmet" combinations to appeal to yuppie tastes.

In clothing, designer labels and scaled-down adult looks are making inroads, even though baby outgrows them in three months.

The focus on toys is educational. On accessories, it's quality, appearance and safety. And with an ever-growing number of mothers in the work force, convenience is a must for *all* products today.

All these trends affect how baby products are sold in the military, because as TSA's Bill Mehler put it, "We're a microcosm of the overall market."

With the birth rate rising at least until 1990 and military wives continuing to have babies at an earlier age than civilian wives, commissaries and exchanges continue to be a great environment for selling baby products – provided marketers recognize that military shoppers with families have become increasingly selective and value-conscious. ■

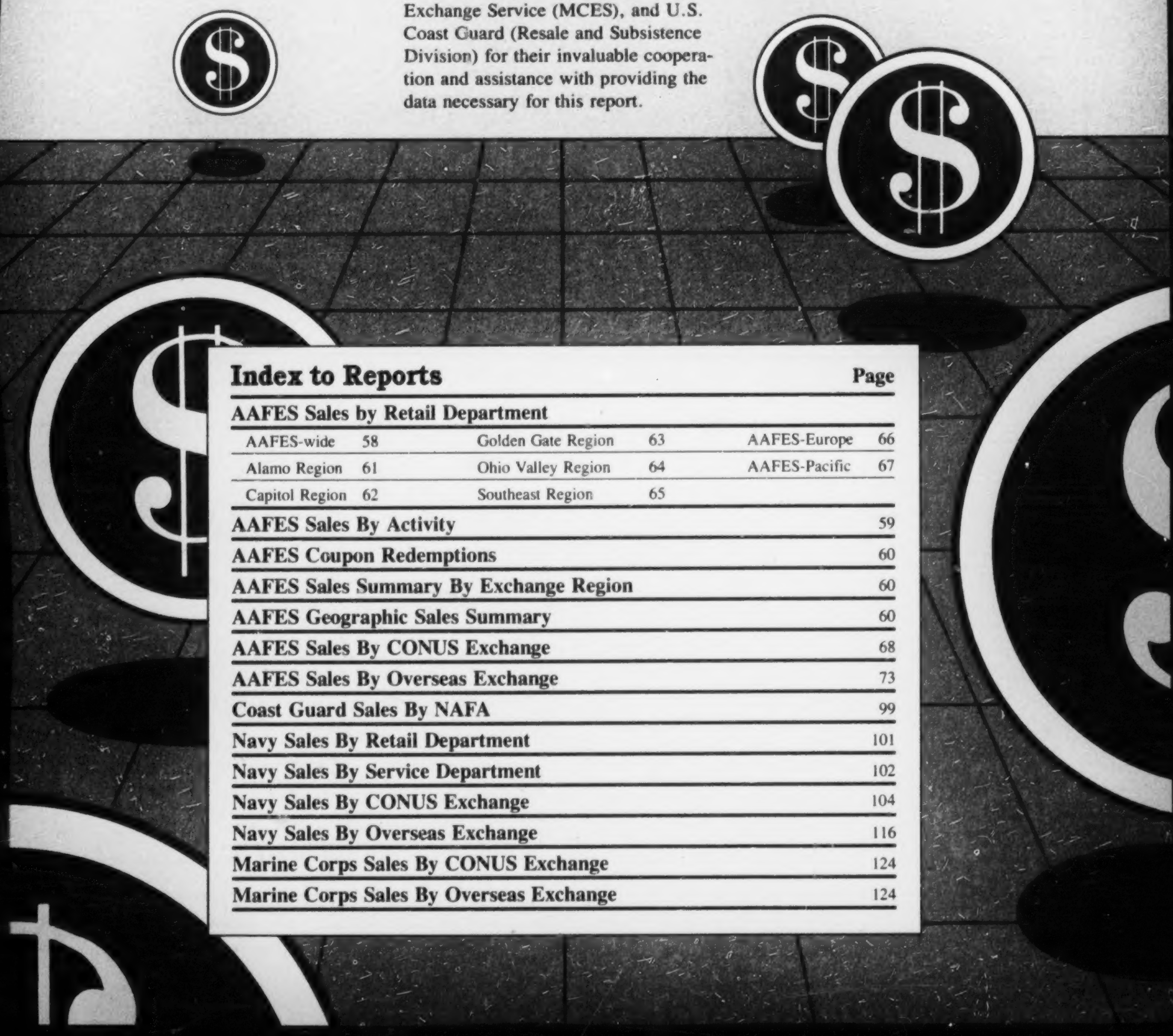
FACTS & FIGURES

6th Annual
Exchange Sales Report
FY 1986

BY JULIE BAILES LEGG

The ALA is indebted to the Army and Air Force Exchange Service (AAFES), Navy Resale and Services Support Office (NAVRESSO), Marine Corps Exchange Service (MCES), and U.S. Coast Guard (Resale and Subsistence Division) for their invaluable cooperation and assistance with providing the data necessary for this report.

Julie Bailes Legg is the managing editor of Interservice *magazine.*



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AAFES Exchange Sales—FY 86

Summary of Sales by Retail Department ($ In Thousands)

Department/Dept. Code	Domestic $	 %	Overseas $	 %	Mail Order $	 %	Worldwide $	 %	% Change 86/85
Automotive/01	78,400	3.2	37,780	2.4	93	0.2	116,273	2.8	10.6
Gasoline/02	218,222	8.9	116,298	7.3			334,520	8.2	−24.5
Automotive Labor/03	11,836	0.5	1,744	0.1			13,580	0.3	13.7
Tobacco Products/10	97,275	4.0	32,213	2.0	6	0.0	129,494	3.2	−1.1
DPSC Merchandise/19	107,619	4.4	37,553	2.4			145,172	3.6	3.0
Food, Candy & Snacks/20	149,745	6.1	116,411	7.3	105	0.2	266,261	6.5	10.7
Beer and Beverages/23	120,490	4.9	85,488	5.4			205,978	5.0	7.1
Toiletries/30	134,117	5.5	71,373	4.5	423	0.8	205,913	5.0	3.6
Cosmetics & Fragrances/34	71,356	2.9	28,472	1.8			99,828	2.4	12.2
Military Wear/40	56,561	2.3	18,567	1.2			75,128	1.8	18.6
Jewelry/50	25,050	1.0	12,463	0.8	7,691	15.4	45,204	1.1	−1.5
Watches/51	27,216	1.1	15,706	1.0	48	0.1	42,970	1.1	14.0
Precious & Semi-Precious Jewelry/56	43,997	1.8	31,479	2.0	8	0.0	75,484	1.8	32.2
Stationery/60	124,641	5.1	51,760	3.3	997	2.0	177,398	4.3	6.7
Men's Clothing/70	51,102	2.1	33,791	2.1	100	0.2	84,993	2.1	2.8
Men's Furnishings/71	98,360	4.0	51,733	3.3	108	0.2	150,201	3.7	4.3
Women's Outerwear/72	75,270	3.1	46,993	3.0	269	0.5	122,532	3.0	5.3
Women's Lingerie/73	57,402	2.3	20,878	1.3	448	0.9	78,728	1.9	1.8
Boyswear/74	25,732	1.1	15,697	1.0			41,429	1.0	0.2
Girlswear/75	19,329	0.8	14,216	0.9	8	0.0	33,553	0.8	0.7
Infants' & Toddlers' Wear/76	32,595	1.3	22,637	1.4	13	0.0	55,245	1.4	9.5
Footwear/77	93,430	3.8	46,391	2.9	549	1.1	140,370	3.4	11.2
Linens & Domestics/78	41,554	1.7	25,773	1.6	451	0.9	67,778	1.7	1.9
Yardage, Notions & Sewing/79	12,051	0.5	10,900	0.7	632	1.3	23,583	0.6	−16.1
Dinnerware & Flatwear/80	9,412	0.4	5,966	0.4	2,802	5.6	18,180	0.4	−10.8
Kitchenware, Pots & Pans/81	29,713	1.2	15,783	1.0	530	1.1	46,026	1.1	3.3
Giftware/82	25,858	1.1	23,561	1.5	5,168	10.4	54,587	1.3	12.5
Cleaning Supplies/83	35,466	1.4	19,508	1.2	62	0.1	55,036	1.3	7.7
Traffic & Major Appliances/85	57,758	2.4	39,318	2.5	1,246	2.5	98,322	2.4	−13.2
Furniture & Rugs/86	22,770	0.9	32,280	2.0	2,235	4.5	57,285	1.4	15.2
Hardware, Tools, Garden & Pet Supplies/87	64,255	2.6	19,306	1.2	92	0.2	83,653	2.0	20.1
Luggage/88	19,006	0.8	8,783	0.6	183	0.4	27,972	0.7	−2.3
Outdoor Living/89	57,848	2.4	9,368	0.6	57	0.1	67,273	1.6	8.7
Sporting Goods & Camping Supplies/91	37,403	1.5	17,576	1.1	1,150	2.3	56,129	1.4	4.3
Developed Film/92	15,228	0.6	3,082	0.2			18,310	0.4	−2.8
Photographic, Optical and Photo Processing/93	54,135	2.2	46,682	2.9	3,103	6.2	103,920	2.5	−4.3
Toys & Games/95	48,981	2.0	45,375	2.9	1,034	2.1	95,390	2.3	15.4
Home Entertainment, Including Computers & Musical Instruments/97	166,144	6.8	310,698	19.6	19,912	39.9	496,754	12.2	4.1
Records & Tapes, Video Cassettes/98	31,991	1.3	41,331	2.6	365	0.7	73,687	1.8	16.3
Total	**$2,449,318**	**100.0%**	**$1,584,933**	**100.0%**	**$49,888**	**100.0%**	**$4,084,139**	**100.0%**	**4.0%**

Note: AAFES sales for FY86 are preliminary and unaudited.

AAFES
Worldwide Direct Sales By Activity—FY86
($ in Thousands)

Retail

Activity Description	Sales	% Total
Main Store	2,274,625	55.69
Branch Retail Store	447,645	10.96
Specialized Retail Store	687,595	16.83
Auto Parts	417,654	10.23
Delicatessen (Foodland)	186,213	4.56
Concession (Exchange Mdse)	7,396	0.18
Miscellaneous	63,454	1.55
Total Retail	**$4,084,582**	**100.00%**

Food

Activity Description	Sales	% Total
Cafeteria I	92,491	21.36
Cafeteria II	95,126	21.97
Cafeteria III	70,645	16.32
Food Franchise Operations	98,676	22.79
Mobile Snack Bar	20,177	4.66
School Lunch Feeding Program	9,231	2.13
Snack Stand	18,267	4.22
Delicatessen	11,547	2.67
Ice Cream Store	13,932	3.22
Miscellaneous	2,843	0.66
Total Food	**$432,935**	**100.00%**

Services

Activity Description	Sales	% Total
Bus or Taxi Service	335	0.58
Vehicle Inspection Station	111	0.19
Miscellaneous	16	0.03
Barber Shop (Direct)	118	0.20
Beauty Shop	218	0.37
Laundry/Dry Cleaning Services	26	0.05
Appliance Repair	162	0.28
Flower Shop	6	0.01
Rental Service	624	1.07
Recreation Type Service	13	0.02
Service Pick-Up-Point (Direct)	2,654	4.55
Delivery Service	870	1.49
Motion Picture Theater	27,279	46.83
Service Pick-Up-Point (Concessions)	25,290	43.41
Service Activities	537	0.92
Total Services	**$58,260**	**100.00%**

Vending

Activity Description	Sales	% Total
Consumable Products Machines	129,381	91.36
Nonconsumable Products Machines	2	
Service Vending Machines	145	0.10
Coin Operated Car Wash	184	0.13
Random Washer & Dryer Machines	4	
Launderette Service	4,221	2.98
Jukebox	986	0.70
Amusement/ Game Machines	6,588	4.65
Miscellaneous	116	0.08
Total Vending	**$141,628**	**100.00%**

Note: Totals may not add due to rounding.

AAFES Exchange Coupon Redemptions—FY86 ($ in Thousands)

CONUS Region	Number	% of CONUS	% of Worldwide	$ Value	% of CONUS	% of Worldwide
Alamo	730	15	13	514	15	13
Southeast	1,246	25	22	565	16	14
Capitol	1,072	22	19	962	27	25
Golden Gate	698	14	13	541	15	14
Ohio Valley	1,147	24	20	942	27	24
CONUS Totals	**4,893**	**100%**	**87%**	**$3,524**	**100%**	**90%**
Overseas Region	**Number**	**% of Overseas**	**% of Worldwide**	**$ Value**	**% of Overseas**	**% of Worldwide**
Europe	298	40	5	121	32	3
Pacific	443	60	8	263	68	7
Overseas Totals	**740**	**100%**	**13%**	**$385**	**100%**	**10%**
Worldwide Total	**5,634**			**$3,904**		

Note: Totals may not add due to rounding.

Geographic Sales Summary ($ in Thousands)

Category	Domestic	Overseas	Mail Order	Worldwide
Retail	2,449,761	1,584,933	49,888	4,084,582
Food	205,040	227,895	0	432,935
Services	11,840	46,420	0	58,260
Vending	72,641	68,987	0	141,628
Concessions	273,871	195,498	0	469,369
Total	**$3,013,153**	**$2,123,733**	**$49,888**	**$5,186,774**

Note: Totals may not add due to rounding.

Domestic Sales by Exchange Region ($ in Millions)

Exchange Region	Retail Net Sales	Food Net Sales	Services Net Sales	Vending Net Sales	Concession Sales	Total
Alamo	462.9	38.9	1.8	9.9	61.8	575.3
Capitol	445.8	25.1	2.3	10.3	44.2	527.7
Golden Gate	501.7	49.7	2.5	13.4	51.0	618.3
Ohio Valley	426.7	43.4	2.1	16.7	48.4	537.3
Southeast	612.2	48.0	3.2	22.3	68.5	754.2
HQ Activities	0.4	0.0	0.0	0.0	0.0	0.4
Total	**$2,449.8**	**$205.0**	**$11.8**	**$72.6**	**$273.9**	**$3,012.2**

Note: Totals may not add due to rounding.

AAFES Exchange Sales—FY86

Alamo Exchange Region Sales by Retail Department ($ in Thousands)

Department/Dept. Code	FY 86 Department Sales	% of All-Dept. Region Total	% of Domestic Dept. Total	% of Worldwide Dept. Total	FY 85 Department Sales	Dept. Sales % Change 86/85
Automotive/01	14,604	3.2	18.6	12.6	13,021	10.8
Gasoline/02	38,079	8.2	17.4	11.4	52,540	−38.0
Automotive Labor/03	1,970	0.4	16.6	14.5	1,588	19.4
Tobacco Products/10	17,375	3.8	17.9	13.4	18,637	−7.3
DPSC Merchandise/19	19,853	4.3	18.4	13.7	18,799	5.3
Food, Candy & Snacks/20	27,965	6.0	18.7	10.5	26,600	4.9
Beer and Beverages/23	23,724	5.1	19.7	11.5	23,618	0.4
Toiletries/30	25,126	5.4	18.7	12.2	24,975	0.6
Cosmetics & Fragrances/34	14,974	3.2	21.0	15.0	14,125	5.7
Military Wear/40	11,491	2.5	20.3	15.3	10,750	6.4
Jewelry/50	4,855	1.0	19.4	12.9	4,830	0.5
Watches/51	5,620	1.2	20.6	13.1	5,106	9.1
Precious & Semi-Precious Jewelry/56	9,373	2.0	21.3	12.4	6,030	35.7
Stationery/60	24,233	5.2	19.4	13.7	23,824	1.7
Men's Clothing/70	10,102	2.2	19.8	11.9	10,648	−5.4
Men's Furnishings/71	18,795	4.1	19.1	12.5	19,548	−4.0
Women's Outerwear/72	14,866	3.2	19.8	12.2	16,119	−8.4
Women's Lingerie/73	11,175	2.4	19.5	14.3	11,389	−1.9
Boyswear/74	4,777	1.0	18.6	11.5	4,858	−1.7
Girlswear/75	3,730	0.8	19.3	11.1	3,859	−3.5
Infants' & Toddlers' Wear/76	5,771	1.2	17.7	10.4	5,686	1.5
Footwear/77	18,352	4.0	19.6	13.1	17,901	2.5
Linens & Domestics/78	7,733	1.7	18.6	11.5	7,821	−1.1
Yardage, Notions & Sewing/79	2,632	0.6	21.8	11.5	3,393	−28.9
Dinnerware & Flatwear/80	2,032	0.4	21.6	13.2	2,128	−4.7
Kitchenware, Pots & Pans/81	5,048	1.1	17.0	11.1	5,393	−6.8
Giftware/82	3,918	0.8	15.2	7.9	3,694	5.7
Cleaning Supplies/83	7,385	1.6	20.8	13.4	7,133	3.4
Traffic & Major Appliances/85	10,112	2.2	17.5	10.4	12,426	−22.9
Furniture & Rugs/86	3,779	0.8	16.6	6.9	2,763	26.9
Hardware, Tools, Garden & Pet Supplies/87	11,831	2.6	18.4	14.2	9,976	15.7
Luggage/88	4,561	1.0	24.0	16.4	4,866	−6.7
Outdoor Living/89	13,275	2.9	22.9	19.7	12,883	3.0
Sporting Goods & Camping Supplies/91	7,191	1.6	19.2	13.1	6,797	5.5
Developed Film/92	2,799	0.6	18.4	15.3	3,017	−7.8
Photographic, Optical and Photo Processing/93	10,162	2.2	18.8	10.1	11,076	−9.0
Toys & Games/95	8,594	1.9	17.5	9.1	8,589	0.1
Home Entertainment, Including Computers & Musical Instruments/97	28,627	6.2	17.2	6.0	22,962	19.8
Records & Tapes, Video Cassettes/98	6,430	1.4	20.1	8.8	5,721	11.0
Total	**$462,919**	**100.0%**	**18.9%**	**11.5%**	**$465,089**	**−0.5%**

AAFES Exchange Sales—FY86

Capitol Exchange Region Sales by Retail Department ($ in Thousands)

Department/Dept. Code	FY 86 Department Sales	% of All-Dept. Region Total	% of Domestic Dept. Total	% of Worldwide Dept. Total	FY 85 Department Sales	Dept. Sales % Change 86/85
Automotive/01	14,299	3.2	18.2	12.3	13.549	5.2
Gasoline/02	37,491	8.4	17.2	11.2	53,493	−42.7
Automotive Labor/03	2,106	0.5	17.8	15.5	1,976	6.2
Tobacco Products/10	21,528	4.8	22.1	16.6	22,292	−3.5
DPSC Merchandise/19	20,387	4.6	18.9	14.0	21,029	−3.1
Food, Candy & Snacks/20	24,293	5.4	16.2	9.1	23,504	3.2
Beer and Beverages/23	17,550	3.9	14.6	8.5	17,462	0.5
Toiletries/30	25,701	5.8	19.2	12.5	25,494	0.8
Cosmetics & Fragrances/34	13,675	3.1	19.2	13.7	12,808	6.3
Military Wear/40	11,235	2.5	19.9	15.0	9,576	14.8
Jewelry/50	4,719	1.1	18.8	12.6	4,903	−3.9
Watches/51	4,935	1.1	18.1	11.5	4,442	10.0
Precious & Semi-Precious Jewelry/56	7,316	1.6	16.6	9.7	5,102	30.3
Stationery/60	22,218	5.0	17.8	12.6	21,084	5.1
Men's Clothing/70	10,957	2.5	21.4	12.9	10,722	2.1
Men's Furnishings/71	20,268	4.5	20.6	13.5	20,034	1.2
Women's Outerwear/72	15,239	3.4	20.2	12.5	15,395	−1.0
Women's Lingerie/73	12,740	2.9	22.2	16.3	12,753	−0.1
Boyswear/74	5,357	1.2	20.8	12.9	5,436	−1.5
Girlswear/75	3,891	0.9	20.1	11.6	3,927	−0.9
Infants' & Toddlers' Wear/76	6,153	1.4	18.9	11.1	5,718	7.1
Footwear/77	17,028	3.8	18.2	12.2	15,201	10.7
Linens & Domestics/78	8,604	1.9	20.7	12.8	8,475	1.5
Yardage, Notions & Sewing/79	2,229	0.5	18.5	9.7	2,764	−24.0
Dinnerware & Flatwear/80	1,833	0.4	19.5	11.9	2,167	−18.2
Kitchenware, Pots & Pans/81	5,433	1.2	18.3	11.9	5,212	4.1
Giftware/82	6,245	1.4	24.2	12.6	6,003	3.9
Cleaning Supplies/83	5,974	1.3	16.8	10.9	5,646	5.5
Traffic & Major Appliances/85	9,406	2.1	16.3	9.7	11,524	−22.5
Furniture & Rugs/86	2,205	0.5	9.7	4.0	2,674	−21.3
Hardware, Tools, Garden & Pet Supplies/87	12,728	2.9	19.8	15.2	10,677	16.1
Luggage/88	3,217	0.7	16.9	11.6	3,290	−2.3
Outdoor Living/89	10,650	2.4	18.4	15.8	9,907	7.0
Sporting Goods & Camping Supplies/91	4,565	1.0	12.2	8.3	4,585	−0.4
Developed Film/92	2,422	0.5	15.9	13.2	2,478	−2.3
Photographic, Optical and Photo Processing/93	10,597	2.4	19.6	10.5	10,737	−1.3
Toys & Games/95	7,490	1.7	15.3	7.9	7,237	3.4
Home Entertainment, Including Computers & Musical Instruments/97	28,427	6.4	17.1	6.0	23,299	18.0
Records & Tapes, Video Cassettes/98	4,696	1.1	14.7	6.4	3,715	20.9
Total	**$445,807**	**100.0%**	**18.2%**	**11.1%**	**$446,290**	**−0.1%**

AAFES Exchange Sales—FY86

Golden Gate Exchange Region Sales by Retail Department ($ in Thousands)

Department/Dept. Code	FY 86 Department Sales	% of All-Dept. Region Total	% of Domestic Dept. Total	% of Worldwide Dept. Total	FY 85 Department Sales	Dept. Sales % Change 86/85
Automotive/01	17,201	3.4	21.9	14.8	15,071	12.4
Gasoline/02	61,426	12.2	28.1	18.4	81,364	−32.5
Automotive Labor/03	3,647	0.7	30.8	26.9	3,052	16.3
Tobacco Products/10	15,162	3.0	15.6	11.7	15,886	−4.8
DPSC Merchandise/19	17,509	3.5	16.3	12.1	17,553	−0.3
Food, Candy & Snacks/20	32,341	6.4	21.6	12.2	30,790	4.8
Beer and Beverages/23	20,050	4.0	16.6	9.7	21,259	−6.0
Toiletries/30	25,473	5.1	19.0	12.4	24,953	2.0
Cosmetics & Fragrances/34	14,190	2.8	19.9	14.2	13,273	6.5
Military Wear/40	9,248	1.8	16.4	12.3	7,731	16.4
Jewelry/50	4,614	0.9	18.4	12.3	4,666	−1.1
Watches/51	4,573	0.9	16.8	10.7	4,262	6.8
Precious & Semi-Precious Jewelry/56	9,632	1.9	21.9	12.8	6,662	30.8
Stationery/60	25,328	5.0	20.3	14.4	23,983	5.3
Men's Clothing/70	9,842	2.0	19.3	11.6	11,126	−13.0
Men's Furnishings/71	16,976	3.4	17.3	11.3	17,240	−1.6
Women's Outerwear/72	15,704	3.1	20.9	12.8	15,878	−1.1
Women's Lingerie/73	11,447	2.3	19.9	14.6	11,609	−1.4
Boyswear/74	5,382	1.1	20.9	13.0	5,549	−3.1
Girlswear/75	4,193	0.8	21.7	12.5	4,352	−3.8
Infants' & Toddlers' Wear/76	7,538	1.5	23.1	13.6	7,124	5.5
Footwear/77	16,478	3.3	17.6	11.8	15,084	8.5
Linens & Domestics/78	8,571	1.7	20.6	12.7	8,740	−2.0
Yardage, Notions & Sewing/79	2,185	0.4	18.1	9.5	2,938	−34.5
Dinnerware & Flatwear/80	1,897	0.4	20.2	12.3	2,198	−15.9
Kitchenware, Pots & Pans/81	7,021	1.4	23.6	15.4	6,988	0.5
Giftware/82	6,409	1.3	24.8	13.0	5,539	13.6
Cleaning Supplies/83	6,022	1.2	17.0	11.0	5,730	4.8
Traffic & Major Appliances/85	11,307	2.3	19.6	11.6	12,677	−12.1
Furniture & Rugs/86	4,840	1.0	21.3	8.8	4,923	−1.7
Hardware, Tools, Garden & Pet Supplies/87	12,298	2.5	19.1	14.7	10,266	16.5
Luggage/88	2,757	0.5	14.5	9.9	3,078	−11.6
Outdoor Living/89	9,858	2.0	17.0	14.7	10,508	−6.6
Sporting Goods & Camping Supplies/91	9,839	2.0	26.3	17.9	9,912	−0.7
Developed Film/92	3,761	0.7	24.7	20.5	3,999	−6.3
Photographic, Optical and Photo Processing/93	12,082	2.4	22.3	12.0	12,304	−1.8
Toys & Games/95	11,915	2.4	24.3	12.6	11,012	7.6
Home Entertainment, Including Computers & Musical Instruments/97	36,260	7.2	21.8	7.6	28,973	20.1
Records & Tapes, Video Cassettes/98	6,744	1.3	21.1	9.2	5,879	12.8
Total	**$501,720**	**100.0%**	**20.5%**	**12.4%**	**$504,131**	**−0.5%**

AAFES Exchange Sales—FY86

Ohio Valley Exchange Region Sales by Retail Department ($ in Thousands)

Department/Dept. Code	FY 86 Department Sales	% of All-Dept. Region Total	% of Domestic Dept. Total	% of Worldwide Dept. Total	FY 85 Department Sales	Dept. Sales % Change 86/85
Automotive/01	14,160	3.3	18.1	12.2	13,375	5.5
Gasoline/02	35,101	8.2	16.1	10.5	49,031	−39.7
Automotive Labor/03	1,987	0.5	16.8	14.6	1,753	11.8
Tobacco Products/10	22,506	5.3	23.1	17.4	22,673	−0.7
DPSC Merchandise/19	25,074	5.9	23.3	17.3	23,915	4.6
Food, Candy & Snacks/20	28,932	6.8	19.3	10.9	28,482	1.6
Beer and Beverages/23	19,690	4.6	16.3	9.6	18,127	7.9
Toiletries/30	22,135	5.2	16.5	10.8	21,704	1.9
Cosmetics & Fragrances/34	10,365	2.4	14.5	10.4	9,428	9.0
Military Wear/40	12,393	2.9	21.9	16.5	10,758	13.2
Jewelry/50	4,816	1.1	19.2	12.8	4,988	−3.6
Watches/51	4,926	1.2	18.1	11.5	4,093	16.9
Precious & Semi-Precious Jewelry/56	7,185	1.7	16.3	9.5	4,360	39.3
Stationery/60	23,777	5.6	19.1	13.5	22,465	5.5
Men's Clothing/70	9,027	2.1	17.7	10.6	9,283	−2.8
Men's Furnishings/71	16,018	3.8	16.3	10.7	16,235	−1.4
Women's Outerwear/72	12,082	2.8	16.1	9.9	11,143	7.8
Women's Lingerie/73	8,130	1.9	14.2	10.4	8,472	−4.2
Boyswear/74	4,039	0.9	15.7	9.7	4,297	−6.4
Girlswear/75	3,067	0.7	15.9	9.1	3,332	−8.6
Infants' & Toddlers' Wear/76	5,094	1.2	15.6	9.2	4,907	3.7
Footwear/77	16,264	3.8	17.4	11.6	15,357	5.6
Linens & Domestics/78	6,369	1.5	15.3	9.5	6,801	−6.8
Yardage, Notions & Sewing/79	1,981	0.5	16.4	8.6	2,437	−23.0
Dinnerware & Flatwear/80	1,292	0.3	13.7	8.4	1,407	−8.9
Kitchenware, Pots & Pans/81	4,562	1.1	15.4	10.0	4,591	−0.6
Giftware/82	3,614	0.8	14.0	7.3	3,260	9.8
Cleaning Supplies/83	6,417	1.5	18.1	11.7	6,173	3.8
Traffic & Major Appliances/85	8,674	2.0	15.0	8.9	10,182	−17.4
Furniture & Rugs/86	2,481	0.6	10.9	4.5	2,126	14.3
Hardware, Tools, Garden & Pet Supplies/87	10,829	2.5	16.9	13.0	8,800	18.7
Luggage/88	3,501	0.8	18.4	12.6	3,601	−2.9
Outdoor Living/89	8,507	2.0	14.7	12.7	7,737	9.1
Sporting Goods & Camping Supplies/91	5,149	1.2	13.8	9.4	5,559	−8.0
Developed Film/92	2,823	0.7	18.5	15.4	2,819	0.1
Photographic, Optical and Photo Processing/93	8,949	2.1	16.5	8.9	9,293	−3.8
Toys & Games/95	8,125	1.9	16.6	8.6	7,485	7.9
Home Entertainment, Including Computers & Musical Instruments/97	30,301	7.1	18.2	6.4	22,888	24.5
Records & Tapes, Video Cassettes/98	6,385	1.5	20.0	8.7	5,522	13.5
Total	**$426,727**	**100.0%**	**17.4%**	**10.6%**	**$418,859**	**1.8%**

AAFES Exchange Sales—FY86

Southeast Exchange Region Sales by Retail Department ($ in Thousands)

Department/Dept. Code	FY 86 Department Sales	% of All-Dept. Region Total	% of Domestic Dept. Total	% of Worldwide Dept. Total	FY 85 Department Sales	Dept. Sales % Change 86/85
Automotive/01	18,136	3.0	23.1	15.6	15,857	12.6
Gasoline/02	46,125	7.5	21.1	13.8	61,349	−33.0
Automotive Labor/03	2,126	0.3	18.0	15.7	1,686	20.7
Tobacco Products/10	20,704	3.4	21.3	16.0	20,568	0.7
DPSC Merchandise/19	24,796	4.1	23.0	17.1	24,490	1.2
Food, Candy & Snacks/20	36,214	5.9	24.2	13.6	33,785	6.7
Beer and Beverages/23	39,476	6.4	32.8	19.2	39,669	−0.5
Toiletries/30	35,682	5.8	26.6	17.4	34,642	2.9
Cosmetics & Fragrances/34	18,152	3.0	25.4	18.2	15,481	14.7
Military Wear/40	12,194	2.0	21.6	16.2	9,645	20.9
Jewelry/50	6,046	1.0	24.1	16.1	6,993	−15.7
Watches/51	7,162	1.2	26.3	16.7	6,257	12.6
Precious & Semi-Precious Jewelry/56	10,491	1.7	23.8	13.9	6,545	37.6
Stationery/60	29,085	4.8	23.3	16.5	27,032	7.1
Men's Clothing/70	11,174	1.8	21.9	13.2	11,004	1.5
Men's Furnishings/71	26,303	4.3	26.7	17.5	25,245	4.0
Women's Outerwear/72	17,379	2.8	23.1	14.2	16,046	7.7
Women's Lingerie/73	13,910	2.3	24.2	17.8	14,056	−1.0
Boyswear/74	6,177	1.0	24.0	14.9	6,366	−3.1
Girlswear/75	4,448	0.7	23.0	13.3	4,659	−4.7
Infants' & Toddlers' Wear/76	8,039	1.3	24.7	14.6	7,639	5.0
Footwear/77	25,308	4.1	27.1	18.1	22,113	12.6
Linens & Domestics/78	10,277	1.7	24.7	15.3	10,565	−2.8
Yardage, Notions & Sewing/79	3,024	0.5	25.1	13.2	4,382	−44.9
Dinnerware & Flatwear/80	2,358	0.4	25.1	15.3	2,496	−5.9
Kitchenware, Pots & Pans/81	7,649	1.2	25.7	16.8	7,171	6.2
Giftware/82	5,672	0.9	21.9	11.5	4,621	18.5
Cleaning Supplies/83	9,668	1.6	27.3	17.6	9,096	5.9
Traffic & Major Appliances/85	18,259	3.0	31.6	18.8	21,122	−15.7
Furniture & Rugs/86	9,465	1.5	41.6	17.2	6,667	29.6
Hardware, Tools, Garden & Pet Supplies/87	16,569	2.7	25.8	19.8	13,289	19.8
Luggage/88	4,970	0.8	26.1	17.9	4,980	−0.2
Outdoor Living/89	15,558	2.5	26.9	23.1	13,383	14.0
Sporting Goods & Camping Supplies/91	10,659	1.7	28.5	19.4	10,774	−1.1
Developed Film/92	3,423	0.6	22.5	18.7	3,602	−5.2
Photographic, Optical and Photo Processing/93	12,345	2.0	22.8	12.2	12,103	2.0
Toys & Games/95	12,857	2.1	26.2	13.6	11,775	8.4
Home Entertainment, Including Computers & Musical Instruments/97	42,529	6.9	25.6	8.9	34,270	19.4
Records & Tapes, Video Cassettes/98	7,736	1.3	24.2	10.6	6,433	16.8
Total	**$612,145**	**100.0%**	**25.0%**	**15.2%**	**$587,856**	**4.0%**

AAFES Exchange Sales—FY86

AAFES—Europe Sales by Retail Department ($ in Thousands)

Department/Dept. Code	FY 86 Department Sales	% of All-Dept. Region Total	% of Domestic Dept. Total	% of Worldwide Dept. Total	FY 85 Department Sales	Dept. Sales % Change 86/85
Automotive/01	29,089	2.6	77.0	25.0	25,785	11.4
Gasoline/02	79,800	7.0	68.6	23.9	78,484	1.6
Automotive Labor/03	681	0.1	39.0	5.0	502	26.3
Tobacco Products/10	23,975	2.1	74.4	18.5	22,053	8.0
DPSC Merchandise/19	28,235	2.5	75.2	19.4	25,761	8.8
Food, Candy & Snacks/20	83,348	7.3	71.6	31.3	65,441	21.5
Beer and Beverages/23	73,178	6.4	85.6	35.5	57,740	21.1
Toiletries/30	49,927	4.4	70.0	24.3	44,862	10.1
Cosmetics & Fragrances/34	18,475	1.6	64.9	18.5	13,353	27.7
Military Wear/40	14,543	1.3	78.3	19.4	9,464	34.9
Jewelry/50	10,089	0.9	81.0	26.9	9,331	7.5
Watches/51	11,853	1.0	75.5	27.6	9,413	20.6
Precious & Semi-Precious Jewelry/56	19,782	1.7	62.8	26.2	13,332	32.6
Stationery/60	33,935	3.0	65.6	19.2	29,206	13.9
Men's Clothing/70	29,569	2.6	87.5	34.8	25,888	12.4
Men's Furnishings/71	41,404	3.6	80.0	27.6	35,793	13.6
Women's Outerwear/72	38,015	3.3	80.9	31.1	32,395	14.8
Women's Lingerie/73	16,344	1.4	78.3	20.9	14,138	13.5
Boyswear/74	12,936	1.1	82.4	31.2	12,103	6.4
Girlswear/75	11,580	1.0	81.5	34.5	10,567	8.7
Infants' & Toddlers' Wear/76	17,258	1.5	76.2	31.2	14,300	17.1
Footwear/77	37,416	3.3	80.7	26.8	30,123	19.5
Linens & Domestics/78	18,229	1.6	70.7	27.1	17,091	6.2
Yardage, Notions & Sewing/79	7,195	0.6	66.0	31.3	7,088	1.5
Dinnerware & Flatwear/80	4,455	0.4	74.7	29.0	4,018	9.8
Kitchenware, Pots & Pans/81	11,609	1.0	73.6	25.5	10,811	6.9
Giftware/82	20,587	1.8	87.4	41.7	16,296	20.8
Cleaning Supplies/83	14,296	1.3	73.3	26.0	12,136	15.1
Traffic & Major Appliances/85	23,641	2.1	60.1	24.4	25,863	−9.4
Furniture & Rugs/86	19,226	1.7	59.6	34.9	17,266	10.2
Hardware, Tools, Garden & Pet Supplies/87	13,791	1.2	71.4	16.5	9,517	31.0
Luggage/88	7,358	0.6	83.8	26.5	6,932	5.8
Outdoor Living/89	6,345	0.6	67.7	9.4	4,728	25.5
Sporting Goods & Camping Supplies/91	11,284	1.0	64.2	20.5	8,250	26.9
Developed Film/92	157	0.0	5.1	0.9	79	49.7
Photographic, Optical and Photo Processing/93	30,327	2.7	65.0	30.1	30,353	−0.1
Toys & Games/95	35,633	3.1	78.5	37.8	27,553	22.7
Home Entertainment, Including Computers & Musical Instruments/97	204,009	17.9	65.7	42.8	204,890	−0.4
Records & Tapes, Video Cassettes/98	30,344	2.7	73.4	41.4	25,153	17.1
Total	**$1,139,918**	**100.0%**	**71.9%**	**28.3%**	**$1,008,058**	**11.6%**

AAFES Exchange Sales—FY86

AAFES—Pacific Sales by Retail Department ($ in Thousands)

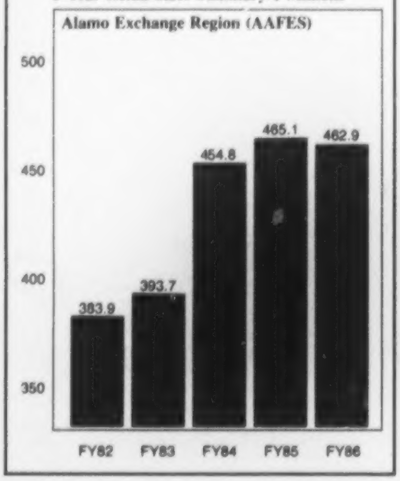
Department/Dept. Code	FY 86 Department Sales	% of All-Dept. Region Total	% of Domestic Dept. Total	% of Worldwide Dept. Total	FY 85 Department Sales	Dept. Sales % Change 86/85
Automotive/01	8,691	2.0	23.0	7.5	7,222	16.9
Gasoline/02	36,498	8.2	31.4	10.9	40,258	−10.3
Automotive Labor/03	1,063	0.2	61.0	7.8	1,158	−8.9
Tobacco Products/10	8,238	1.9	25.6	6.4	8,748	−6.2
DPSC Merchandise/19	9,318	2.1	24.8	6.4	7,883	15.4
Food, Candy & Snacks/20	33,063	7.4	28.4	12.4	28,980	12.3
Beer and Beverages/23	12,310	2.8	14.4	6.0	13,396	−8.8
Toiletries/30	21,446	4.8	30.0	10.4	21,438	0.0
Cosmetics & Fragrances/34	9,997	2.2	35.1	10.0	9,191	8.1
Military Wear/40	4,024	0.9	21.7	5.4	3,262	18.9
Jewelry/50	2,374	0.5	19.0	6.3	3,296	−38.8
Watches/51	3,853	0.9	24.5	9.0	3,344	13.2
Precious & Semi-Precious Jewelry/56	11,697	2.6	37.2	15.5	9,142	21.8
Stationery/60	17,825	4.0	34.4	10.1	17,030	4.5
Men's Clothing/70	4,222	0.9	12.5	5.0	3,839	9.1
Men's Furnishings/71	10,329	2.3	20.0	6.9	9,488	8.1
Women's Outerwear/72	8,978	2.0	19.1	7.3	8,751	2.5
Women's Lingerie/73	4,534	1.0	21.7	5.8	4,369	3.6
Boyswear/74	2,761	0.6	17.6	6.7	2,724	1.3
Girlswear/75	2,636	0.6	18.5	7.9	2,598	1.4
Infants' & Toddlers' Wear/76	5,379	1.2	23.8	9.7	4,617	14.2
Footwear/77	8,975	2.0	19.3	6.4	8,356	6.9
Linens & Domestics/78	7,544	1.7	29.3	11.2	6,470	14.2
Yardage, Notions & Sewing/79	3,705	0.8	34.0	16.1	3,856	−4.1
Dinnerware & Flatwear/80	1,511	0.3	25.3	9.8	2,764	−82.9
Kitchenware, Pots & Pans/81	4,174	0.9	26.4	9.2	3,727	10.7
Giftware/82	2,974	0.7	12.6	6.0	2,740	7.9
Cleaning Supplies/83	5,212	1.2	26.7	9.5	4,815	7.6
Traffic & Major Appliances/85	15,677	3.5	39.9	16.1	16,230	−3.5
Furniture & Rugs/86	13,054	2.9	40.4	23.7	10,001	23.4
Hardware, Tools, Garden & Pet Supplies/87	5,515	1.2	28.6	6.6	4,240	23.1
Luggage/88	1,425	0.3	16.2	5.1	1,672	−17.3
Outdoor Living/89	3,023	0.7	32.3	4.5	2,208	27.0
Sporting Goods & Camping Supplies/91	6,292	1.4	35.8	11.4	6,697	−6.4
Developed Film/92	2,925	0.7	94.9	16.0	2,823	3.5
Photographic, Optical and Photo Processing/93	16,355	3.7	35.0	16.2	18,688	−14.3
Toys & Games/95	9,742	2.2	21.5	10.3	6,030	38.1
Home Entertainment, Including Computers & Musical Instruments/97	106,689	24.0	34.3	22.4	111,361	−4.4
Records & Tapes, Video Cassettes/98	10,987	2.5	26.6	15.0	8,845	19.5
Total	**$445,015**	**100.0%**	**28.1%**	**11.0%**	**$432,257**	**2.9%**

AAFES Exchange Sales—FY86 (Continental U.S.)

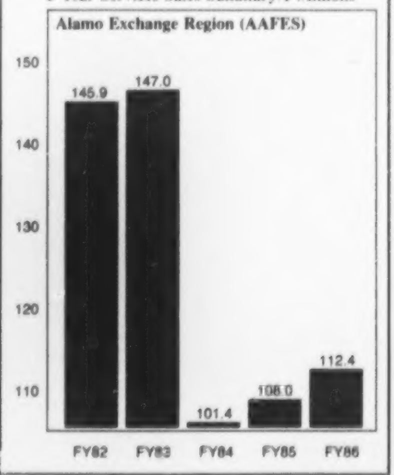
Alamo Region (ALER)

Store	FY 86 $ Sales			Total $ Sales FY 85	Total Sales % Change 86 vs 85
	Retail	Services & Other	Total		
Altus AFB, OK	5,492,000	998,000	6,490,000	6,488,000	0.0
Barksdale AFB, LA	20,746,000	3,315,000	24,061,000	23,546,000	2.1
Bergstrom AFB, TX	17,468,000	2,334,000	19,802,000	19,345,000	2.3
Blytheville AFB, AR	5,906,000	760,000	6,666,000	6,931,000	−4.0
Brooks AFB, TX	2,706,000	512,000	3,218,000	2,819,000	12.4
Cannon AFB, NM	6,272,000	1,441,000	7,713,000	8,270,000	−7.2
Carswell AFB, TX	28,301,000	3,403,000	31,704,000	32,377,000	−2.1
Dyess AFB, TX	8,890,000	1,920,000	10,810,000	10,956,000	−1.4
England AFB, LA	6,345,000	1,040,000	7,385,000	7,511,000	−1.7
Fort Bliss, TX	37,503,000	10,454,000	47,957,000	46,717,000	2.6
Fort Chaffee, AR	2,915,000	190,000	3,105,000	2,519,000	18.9
Fort Hood, TX	57,282,000	18,064,000	75,346,000	75,360,000	0.0
Fort Polk, LA	25,798,000	9,118,000	34,916,000	34,800,000	0.3
Fort Sam Houston, TX	44,979,000	7,588,000	52,567,000	48,379,000	8.0
Fort Sill, OK	29,706,000	10,956,000	40,662,000	41,683,000	−2.5
Goodfellow AFB, TX	4,505,000	1,157,000	5,662,000	5,384,000	4.9
Holloman AFB, NM	11,893,000	3,789,000	15,682,000	15,795,000	−0.7
Kirtland AFB, NM	16,309,000	2,961,000	19,270,000	19,020,000	1.3
Lackland AFB, TX	48,901,000	16,374,000	65,275,000	65,128,000	0.2
Laughlin AFB, TX	4,001,000	837,000	4,838,000	4,614,000	4.6
Little Rock AFB, AR	14,904,000	2,668,000	17,572,000	17,906,000	−1.9
Randolph AFB, TX	19,177,000	2,796,000	21,973,000	21,888,000	0.4
Reese AFB, TX	4,220,000	794,000	5,014,000	5,694,000	−13.6
Sheppard AFB, TX	20,112,000	6,282,000	26,394,000	27,457,000	−4.0
Tinker AFB, OK	16,506,000	2,222,000	18,728,000	19,826,000	−5.9
Vance AFB, OK	2,081,000	415,000	2,496,000	2,695,000	−8.0
ALER Totals	**$462,918,000**	**$112,388,000**	**$575,306,000**	**$573,108,000**	**0.4%**

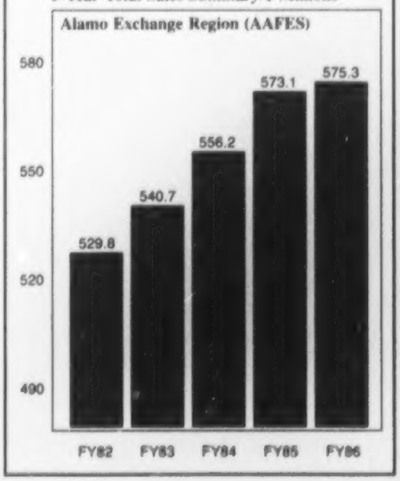
5-Year Retail Sales Summary/$ Millions



5-Year Services Sales Summary/$ Millions



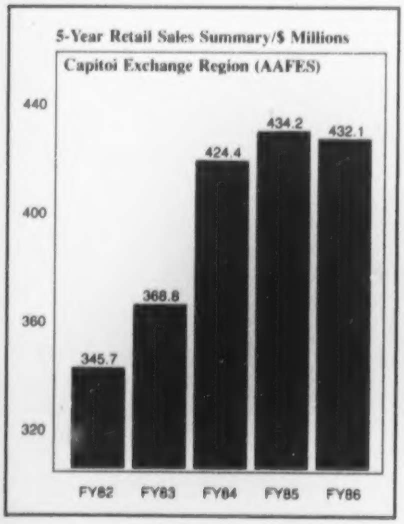
5-Year Total Sales Summary/$ Millions

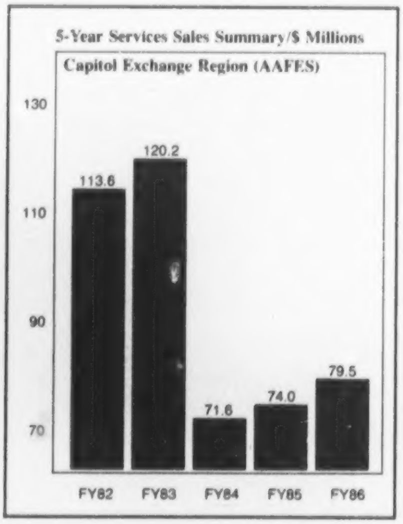


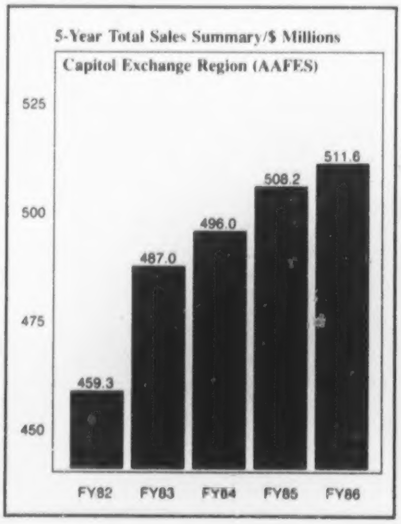
AAFES Exchange Sales—FY86

Capitol Region (CPER)

Store	FY 86 $ Sales Retail	 Services & Other	 Total	Total $ Sales FY 85	Total Sales % Change 86 vs 85
Aberdeen-Edgewood, MD	11,741,000	4,972,000	16,713,000	15,554,000	6.9
Andrews AFB, D.C.	36,540,000	5,383,000	41,923,000	39,8[illegible]5,000	4.9
Bolling AFB, D.C.	17,779,000	2,652,000	20,431,000	21,593,000	−5.7
Cameron Station, VA	25,798,000	1,810,000	27,608,000	27,086,000	1.9
Carlisle Barracks, PA	11,745,000	735,000	12,480,000	13,275,000	−6.4
Dover AFB, DE	10,467,000	2,468,000	12,935,000	13,332,000	−3.1
Fort Belvoir, VA	34,098,000	6,473,000	40,571,000	41,755,000	−2.9
Fort Devens/Hanscom AFB, MA	29,794,000	5,299,000	35,093,000	33,416,000	4.8
Fort Dix/McGuire AFB, NJ	42,778,000	10,704,000	53,482,000	52,753,000	1.4
Fort Drum, NY	9,150,000	1,448,000	10,598,000	8,874,000	16.3
Fort Eustis, VA	20,144,000	4,666,000	24,810,000	23,678,000	4.6
Fort George L. Meade, MD	31,590,000	4,381,000	35,971,000	36,035,000	−0.2
Fort Lee, VA	22,609,000	6,796,000	29,405,000	28,950,000	1.5
Fort Monmouth, NJ	18,702,000	2,592,000	21,294,000	21,622,000	−1.5
Fort Myer, VA	16,549,000	3,780,000	20,329,000	21,066,000	−3.6
Griffiss AFB, NY	12,403,000	1,467,000	13,870,000	14,309,000	−3.2
Langley AFB, VA	25,294,000	4,149,000	29,443,000	28,996,000	1.5
Loring AFB, ME	5,390,000	1,943,000	7,333,000	6,912,000	5.7
Pease AFB, NH	14,198,000	1,515,000	15,713,000	15,757,000	−0.3
Plattsburgh AFB, NY	7,722,000	985,000	8,707,000	9,117,000	−4.7
U.S. Military Academy	10,224,000	2,531,000	12,755,000	12,614,000	1.1
Walter Reed AMC, D.C.	8,718,000	2,690,000	11,408,000	12,165,000	−6.6
Westover AFB, MA	8,688,000	85,000	8,773,000	9,495,000	−8.2
CPER Totals	**$432,121,000**	**$79,524,000**	**$511,645,000**	**$508,219,000**	**0.7%**



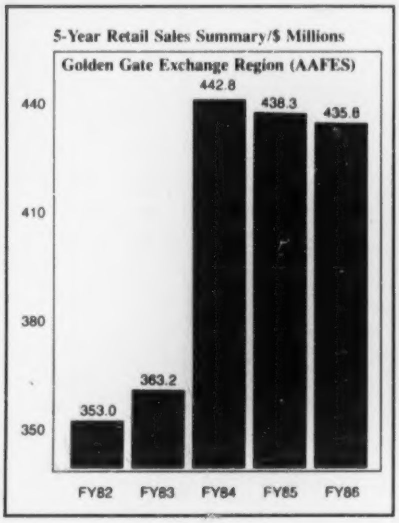


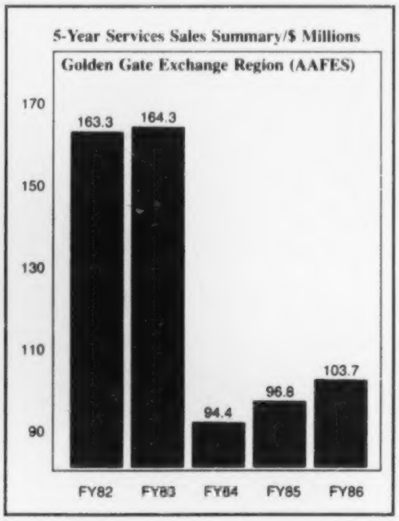


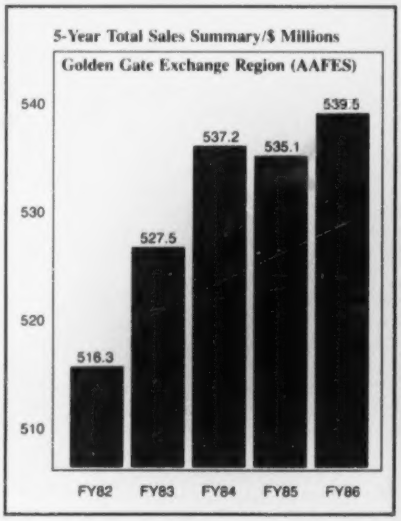
AAFES Exchange Sales—FY86

Golden Gate Region (GGER)

Store	FY 86 $ Sales Retail	FY 86 $ Sales Services & Other	FY 86 $ Sales Total	Total $ Sales FY 85	Total Sales % Change 86 vs 85
Beale AFB, CA	12,304,000	1,710,000	14,014,000	13,062,000	6.8
Castle AFB, CA	11,762,000	2,084,000	13,846,000	13,708,000	1.0
Davis-Monthan AFB, AZ	17,337,000	3,037,000	20,374,000	19,851,000	2.6
Edwards AFB, CA	14,555,000	4,551,000	19,106,000	18,029,000	5.6
Fairchild AFB, WA	10,519,000	1,493,000	12,012,000	12,063,000	−0.4
Fort Huachuca, AZ	13,403,000	4,762,000	18,165,000	17,309,000	4.7
Fort Hunter Liggett/Camp Roberts, CA	2,289,000	927,000	3,216,000	3,791,000	−17.9
Fort Irwin, CA	6,204,000	2,149,000	8,353,000	8,622,000	−3.2
Fort Lewis/McChord AFB, WA	74,733,000	20,116,000	94,849,000	94,853,000	0.0
Fort Ord, CA	40,580,000	13,119,000	53,699,000	54,472,000	−1.4
George AFB, CA	11,348,000	2,429,000	13,777,000	13,726,000	0.4
Hill AFB, UT	14,397,000	1,528,000	15,925,000	15,858,000	0.4
Los Angeles Cons., CA	13,508,000	1,650,000	15,158,000	16,064,000	−6.0
Luke AFB/Williams AFB, AZ	23,723,000	5,754,000	29,477,000	27,780,000	5.8
Malstrom, MT	5,251,000	1,288,000	6,539,000	6,483,000	0.9
Mather AFB, CA	20,698,000	3,627,000	24,325,000	26,228,000	−7.8
McClellan AFB, CA	15,433,000	2,046,000	17,479,000	16,936,000	3.1
Mountain Home AFB, ID	8,042,000	1,560,000	9,602,000	9,804,000	−2.1
Nellis AFB, NY	21,068,000	5,162,000	26,230,000	22,988,000	12.4
Norton AFB/March AFB, CA	35,169,000	6,381,000	41,550,000	41,743,000	−0.5
Presidio of San Francisco, CA	20,182,000	5,035,000	25,217,000	26,516,000	−5.2
Travis AFB, CA	27,450,000	7,820,000	35,270,000	32,848,000	6.9
Vandenberg AFB, CA	15,225,000	4,980,000	20,205,000	21,261,000	−5.2
Yuma Proving Ground, AZ	584,000	515,000	1,099,000	1,140,000	−3.7
GGER Totals	**$435,764,000**	**$103,723,000**	**$539,487,000**	**$535,135,000**	**0.8%**







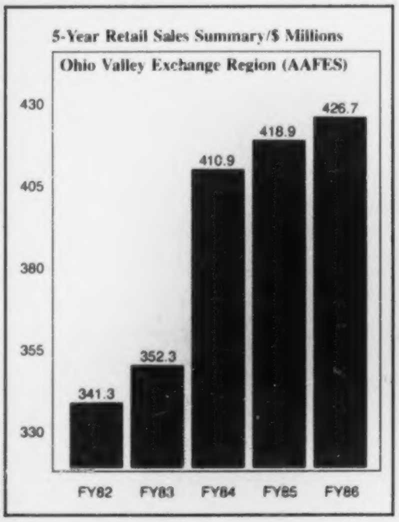
AAFES Exchange Sales—FY86

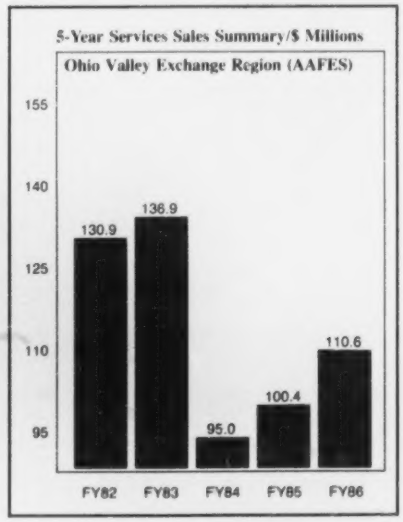
Ohio Valley Region (OVER)

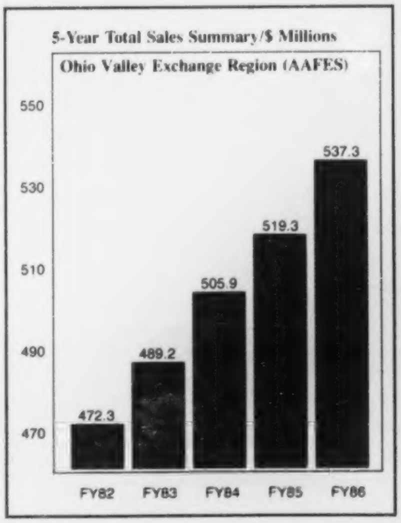
Store	FY 86 $ Sales Retail	FY 86 $ Sales Services & Other	FY 86 $ Sales Total	Total $ Sales FY 85	Total Sales % Change 86 vs 85
Chanute AFB, IL	16,394,000	4,601,000	20,995,000	21,322,000	−1.5
Colorado Springs, CO	25,112,000	3,761,000	28,873,000	27,908,000	3.5
Denver Exchange (Lowry AFB), CO	36,906,000	8,448,000	45,354,000	42,464,000	6.8
Ellsworth AFB, SD	8,399,000	1,935,000	10,334,000	10,056,000	2.8
Fort Benjamin Harrison, IN	14,214,000	3,820,000	18,034,000	16,709,000	7.9
Fort Campbell, KY**	41,864,000	11,445,000	53,309,000	46,923,000	13.6
Fort Carson, CO	23,356,000	10,433,000	33,789,000	32,351,000	4.4
Fort Knox, KY	36,547,000	15,198,000	51,745,000	50,600,000	2.3
Fort Leavenworth, KS	12,281,000	2,758,000	15,039,000	13,755,000	9.3
Fort Leonard Wood, MO	25,041,000	11,326,000	36,367,000	34,080,000	6.7
Fort McCoy, WI	10,838,000	995,000	11,833,000	11,413,000	3.7
Fort Riley, KS	20,902,000	8,039,000	28,941,000	29,323,000	−1.3
Fort Sheridan, IL	7,378,000	770,000	8,148,000	8,016,000	1.6
Francis E. Warren AFB, WY	5,298,000	1,159,000	6,457,000	5,928,000	8.9
Grand Forks AFB, ND	11,507,000	2,751,000	14,258,000	14,072,000	1.3
Grissom AFB, IN	5,579,000	1,254,000	6,833,000	6,910,000	−1.1
K.I. Sawyer AFB, MI	7,532,000	1,497,000	9,029,000	9,642,000	−6.4
McConnell AFB, KS	5,453,000	992,000	6,445,000	7,376,000	−12.6
Minot AFB, ND	9,682,000	3,197,000	12,879,000	12,537,000	2.7
Oakdale ADS, PA	4,209,000	163,000	4,372,000	4,427,000	−1.2
Offutt AFB, NE	22,634,000	4,895,000	27,529,000	25,757,000	6.9
Rickenbacker ANG, OH*				3,974,000	
Scott AFB, IL	24,067,000	4,680,000	28,747,000	27,111,000	6.0
Selfridge ANG, MI	9,057,000	690,000	9,747,000	9,102,000	7.1
Tullahoma (Arnold AFS), TN*				4,489,000	
Whiteman AFB, MO	5,727,000	979,000	6,706,000	7,070,000	−5.1
Wright-Patterson AFB, OH*	28,748,000	3,799,000	32,547,000	26,850,000	21.2
Wurtsmith AFB, MI	8,002,000	981,000	8,983,000	9,172,000	−2.1
OVER Totals	**$426,727,000**	**$110,566,000**	**$537,293,000**	**$519,337,000**	**3.5%**

* Rickenbacker ANG to Wright-Patterson, January 25, 1986.

** Tullahoma to Ft. Campbell, January 25, 1986.



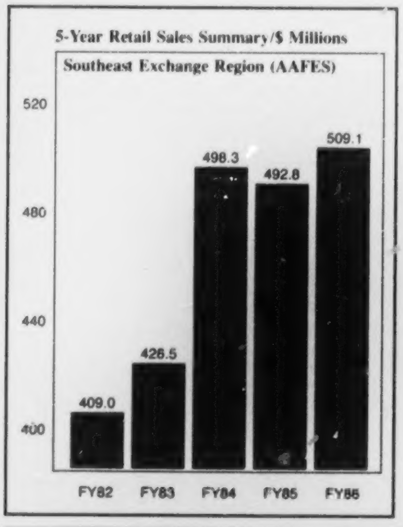


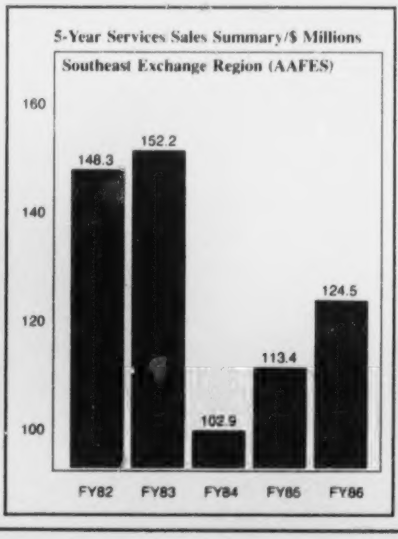


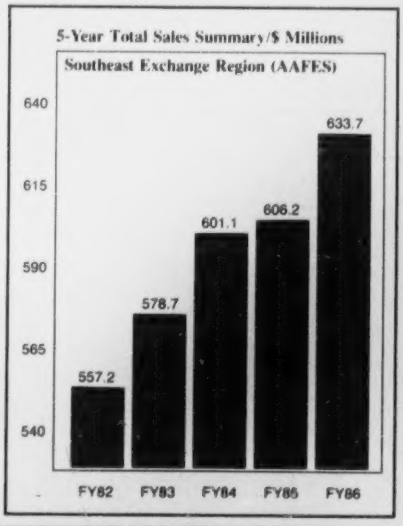
Southeast Region (SEER)

Store	FY 86 $ Sales Retail	Services & Other	Total	Total $ Sales FY 85	Total Sales % Change 86 vs 85
Charleston AFB, SC	11,370,000	1,920,000	13,290,000	12,722,000	4.3
Columbus AFB, MS	5,335,000	781,000	6,116,000	6,445,000	−5.4
Eglin AFB, FL*	31,645,000	5,560,000	37,205,000	31,395,000	15.6
Fort Benning, GA	52,104,000	16,118,000	68,222,000	64,772,000	5.1
Fort Bragg, NC	53,843,000	21,766,000	75,609,000	73,869,000	2.3
Fort Gordon, GA	27,375,000	12,272,000	39,647,000	39,410,000	0.6
Fort Jackson, SC	37,169,000	7,734,000	44,903,000	40,211,000	10.4
Fort McClellan, AL	20,334,000	6,057,000	26,391,000	25,242,000	4.4
Fort McPherson, GA	16,134,000	2,651,000	18,785,000	18,853,000	−0.4
Fort Rucker, AL	18,863,000	5,084,000	23,947,000	22,687,000	5.3
Fort Stewart, GA	26,114,000	10,022,000	36,136,000	34,655,000	4.1
Homestead AFB, FL	20,149,000	2,966,000	23,115,000	21,783,000	5.8
Hurlburt Field, FL*				5,743,000	
Keesler AFB, MS	36,307,000	8,385,000	44,692,000	41,224,000	7.8
MacDill AFB, FL	29,076,000	4,649,000	33,725,000	31,510,000	6.6
Maxwell AFB, AL	22,596,000	3,331,000	25,927,000	24,149,000	6.9
Moody AFB, GA	6,261,000	1,136,000	7,397,000	6,819,000	7.8
Myrtle Beach AFB, SC	9,144,000	1,426,000	10,570,000	10,555,000	0.1
Patrick AFB, FL	22,455,000	3,077,000	25,532,000	23,698,000	7.2
Redstone Arsenal, AL	15,547,000	2,651,000	18,198,000	17,562,000	3.5
Robins AFB, GA	13,094,000	1,239,000	14,333,000	13,934,000	2.8
Seymour Johnson AFB, SC	9,427,000	1,490,000	10,917,000	10,901,000	0.1
Shaw AFB, SC	13,263,000	1,756,000	15,019,000	14,630,000	2.6
Tyndall AFB, FL	11,512,000	2,484,000	13,996,000	13,407,000	4.2
SEER Totals	**$509,117,000**	**$124,555,000**	**$633,672,000**	**$606,176,000**	**4.3%**

* Hurlburt Field to Eglin AFB, January 25, 1986.


5-Year Retail Sales Summary/$ Millions


5-Year Services Sales Summary/$ Millions


5-Year Total Sales Summary/$ Millions

Totals

	FY 86 $ Sales Retail	Services & Other	Total	Total $ Sales FY 85	Total Sales % Change 86 vs 85
CONUS Totals	**$2,266,647,000**	**$530,756,000**	**$2,797,403,000**	**$2,741,975,000**	**2.0%**

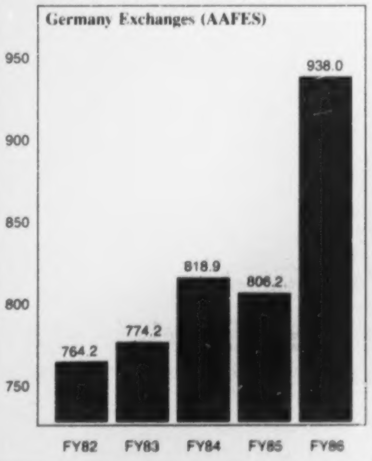
AAFES Exchange Sales—FY86 (Europe)

Germany

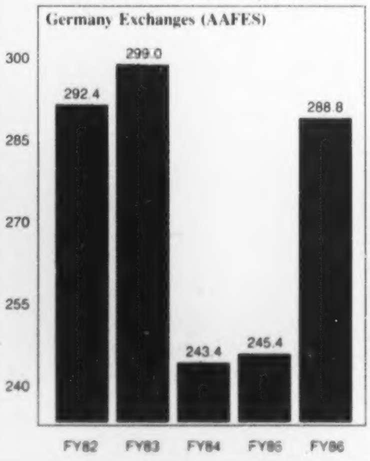
Store	FY 86 $ Sales Retail	Services & Other	Total	Total $ Sales FY 85	Total Sales % Change 86 vs 85
Chievres Exchange (Belgium)	13,190,000	3,301,000	16,491,000	13,329,000	19.2
Tri-Border (TBAX)*	324,060,000	90,879,000	414,939,000	358,797,000	13.5
Kaiserslauten Area (KAAX)	275,397,000	81,315,000	356,712,000	322,082,000	9.7
Nuremberg Area (NUAX)	156,849,000	55,063,000	211,912,000	188,663,000	11.0
Spangdahlem Area (SAAX)		21,000	21,000	274,000	**
Stuttgart Area (SGAX)	168,489,000	58,182,000	226,671,000	195,131,000	13.9
Germany Exchanges' Totals	**$937,985,000**	**$288,761,000**	**$1,226,746,000**	**$1,078,276,000**	**

* Includes Belgium.
** Comparison with prior year's data not meaningful.

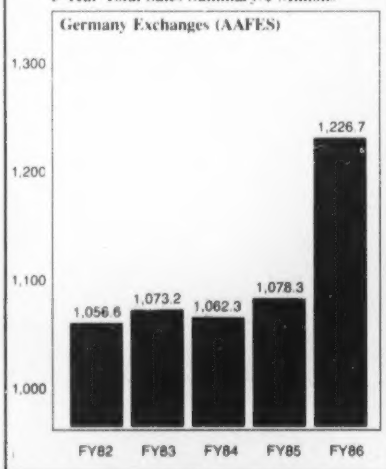
5-Year Retail Sales Summary/$ Millions



5-Year Services Sales Summary/$ Millions



5-Year Total Sales Summary/$ Millions



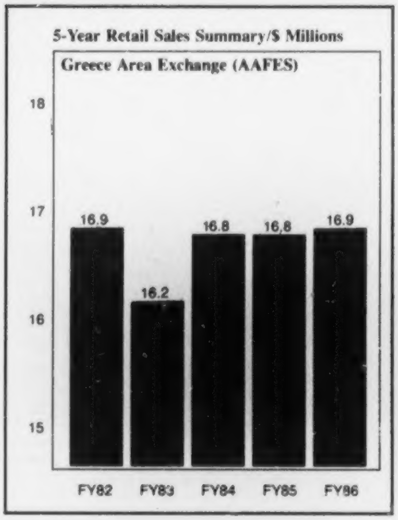
Germany—Other

Exchange	FY 86 $ Sales Retail	Services & Other	Total	Total $ Sales FY 85	Total Sales % Change 86 vs 85
European Dist. Activity	57,000	0	57,000	77,000	−35
European Industrial Act.	11,046,000	0	11,046,000	1,894,000	83
Outlying Depots	$2,054,000	$0	$2,054,000	*	*

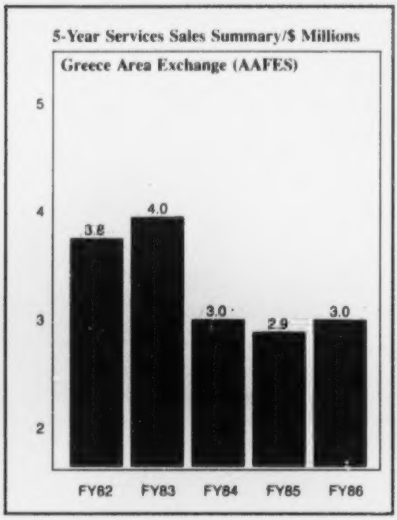
* Comparison with prior year's data not meaningful.

Greece

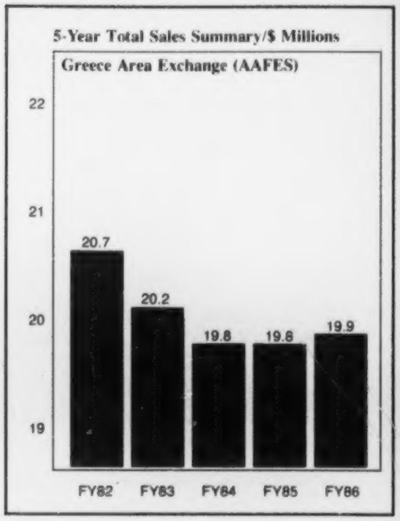
Store					
Greece Area Exchange (GRAX)	$16,910,000	$2,992,000	$19,902,000	$19,781,000	0.6%


5-Year Retail Sales Summary/$ Millions

Greece Area Exchange (AAFES)


5-Year Services Sales Summary/$ Millions

Greece Area Exchange (AAFES)

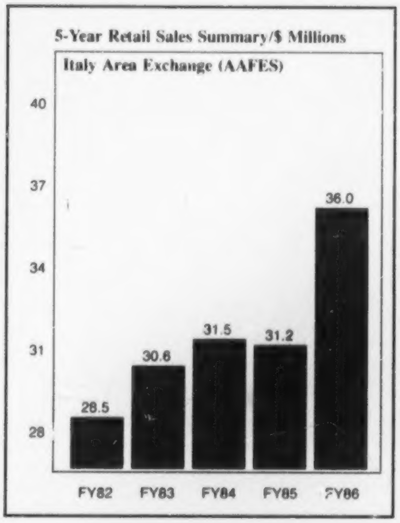

5-Year Total Sales Summary/$ Millions

Greece Area Exchange (AAFES)

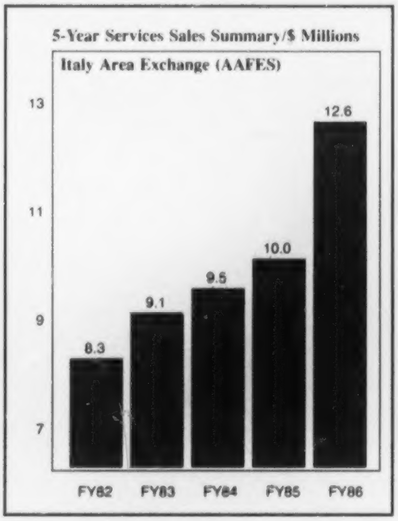
AAFES Exchange Sales—FY86

Italy

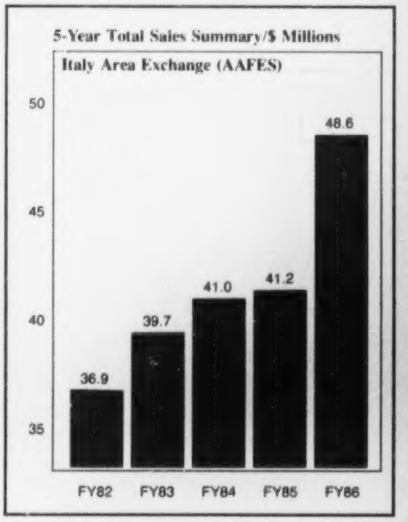
Store	FY 86 $ Sales Retail	Services & Other	Total	Total $ Sales FY 85	Total Sales % Change 86 vs 85
Italy Area (ITAX)	$35,955,000	$12,609,000	$48,564,000	$41,182,000	17.9%


5-Year Retail Sales Summary/$ Millions

Italy Area Exchange (AAFES)


5-Year Services Sales Summary/$ Millions

Italy Area Exchange (AAFES)

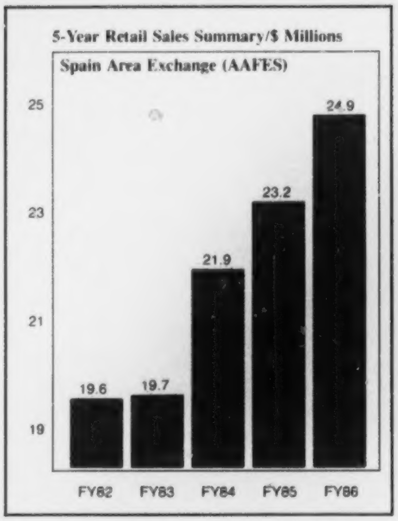

5-Year Total Sales Summary/$ Millions

Italy Area Exchange (AAFES)

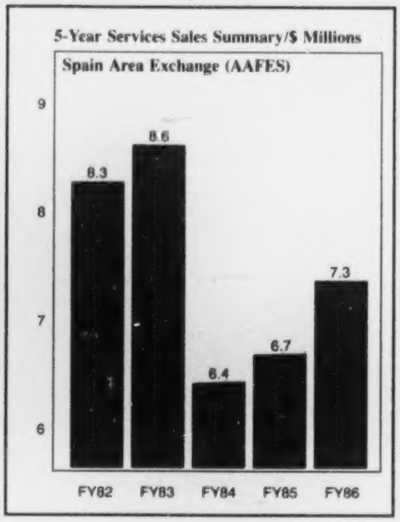
AAFES Exchange Sales—FY86

Spain

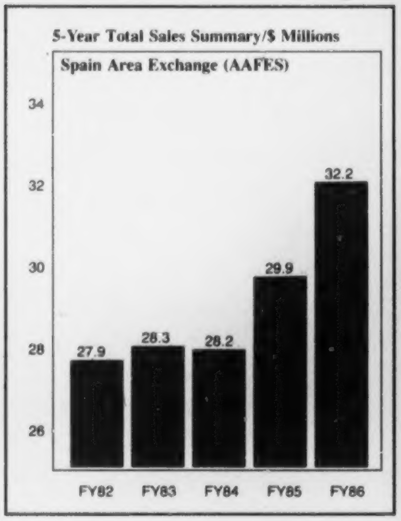
Exchange Area	FY 86 $ Sales Retail	Services & Other	Total	Total $ Sales FY 85	Total Sales % Change 86 vs 85
Spain Area (SPAX)	$24,884,000	$7,311,000	$32,195,000	$29,861,000	7.2%


5-Year Retail Sales Summary/$ Millions

Spain Area Exchange (AAFES)


5-Year Services Sales Summary/$ Millions

Spain Area Exchange (AAFES)


5-Year Total Sales Summary/$ Millions

Spain Area Exchange (AAFES)

AAFES Exchange Sales—FY86

Turkey

Exchange Area	FY 86 $ Sales Retail	FY 86 $ Sales Services & Other	FY 86 $ Sales Total	Total $ Sales FY 85	Total Sales % Change 86 vs 85
Turkey Area (TUAX)	$23,455,000	$3,095,000	$26,550,000	$26,644,000	**−0.4%**

MILITARY MARKETING QUIZ

Answers

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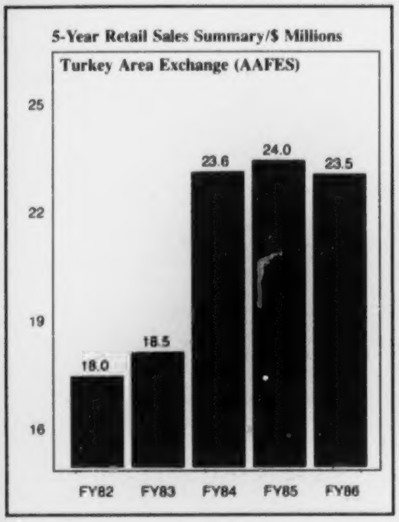
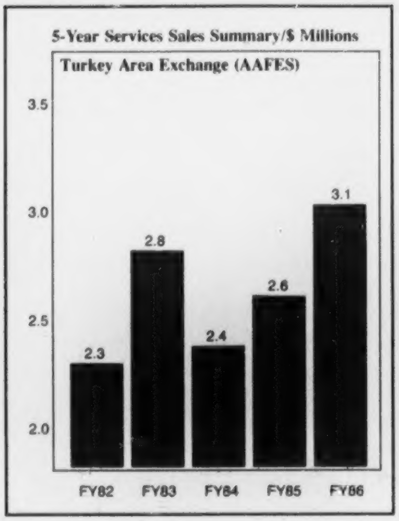
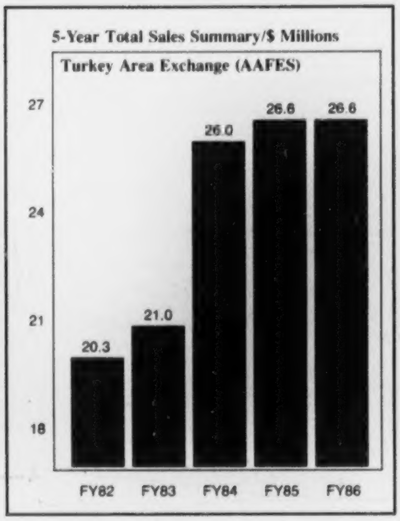


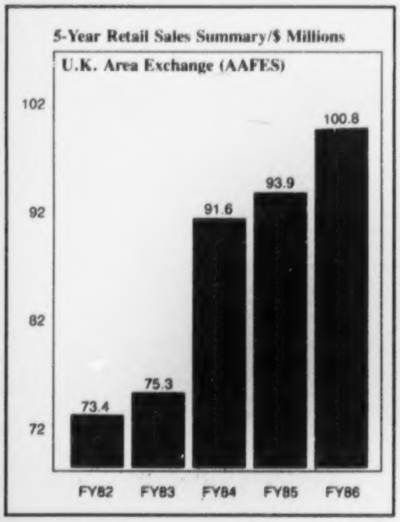


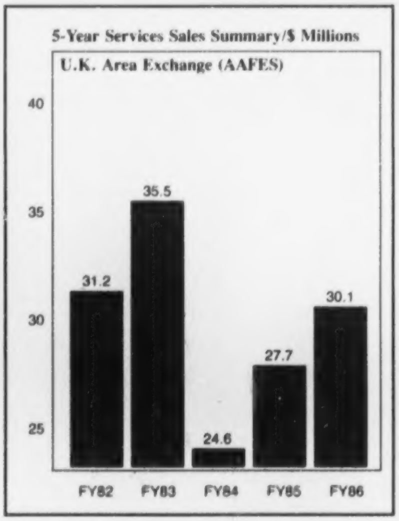


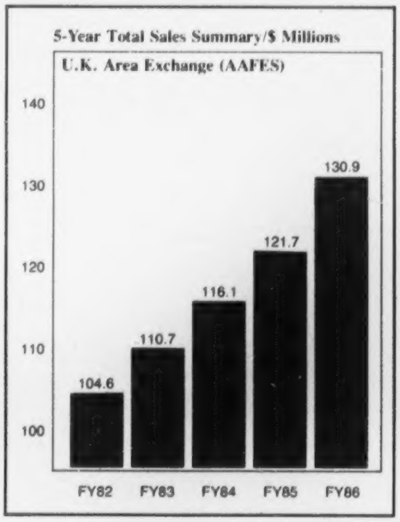
AAFES Exchange Sales—FY86

United Kingdom

Exchange Area	FY 86 $ Sales Retail	Services & Other	Total	Total $ Sales FY 85	Total Sales % Change 86 vs 85
United Kingdom Area (UKAX)	$100,764,000	$30,104,000	$130,868,000	$121,690,000	7.0%







AAFES

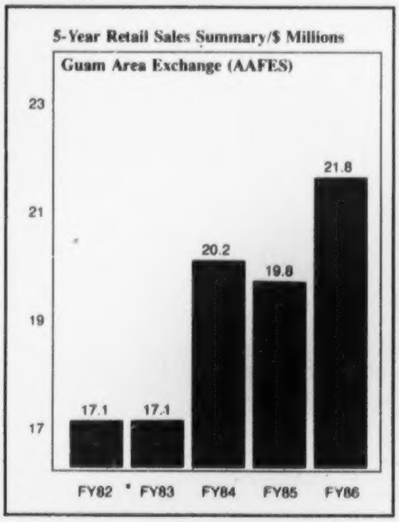
Totals

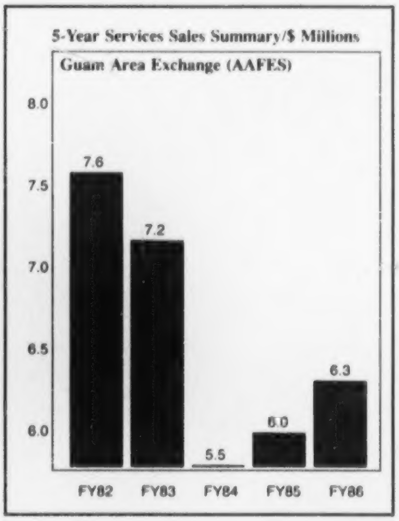
	FY 86 $ Sales Retail	Services & Other	Total	Total $ Sales FY 85	Total Sales % Change 86 vs 85
AAFES Europe Totals	**$1,142,007,000**	**$344,872,000**	**$1,486,879,000**	**$1,306,076,000**	**12.2%**

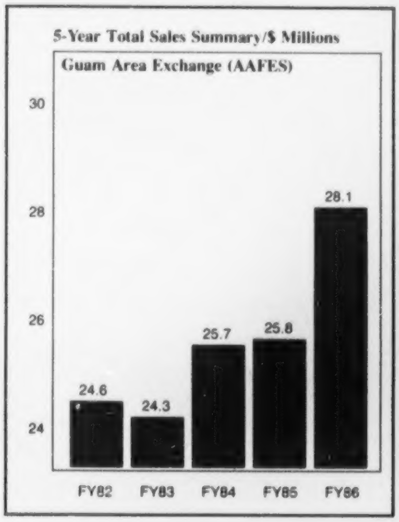
AAFES Exchange Sales—FY86 (Pacific)

Guam

Exchange Area	FY 86 $ Sales Retail	 Services & Other	 Total	Total $ Sales FY 85	Total Sales % Change 86 vs 85
Guam Area (GUAX)	$21,809,000	$6,337,000	$28,146,000	$25,753,000	8.5%


5-Year Retail Sales Summary/$ Millions

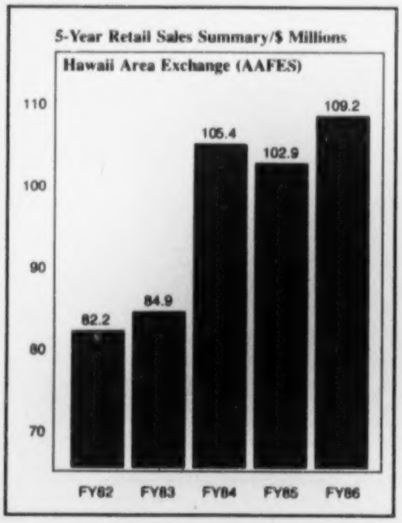

5-Year Services Sales Summary/$ Millions

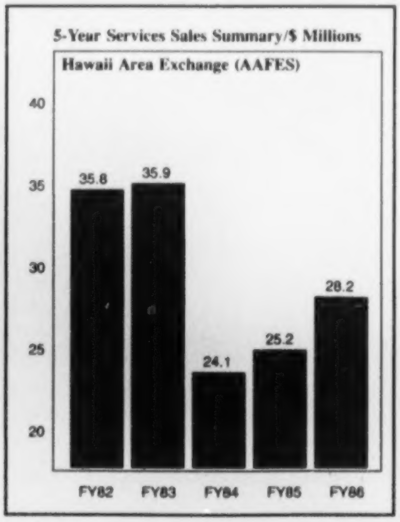

5-Year Total Sales Summary/$ Millions

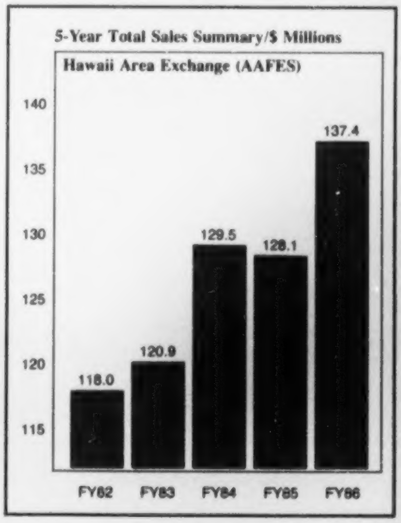
AAFES Exchange Sales—FY86

Hawaii

Exchange Area	FY 86 $ Sales Retail	 Services & Other	 Total	Total $ Sales FY 85	Total Sales % Change 86 vs 85
Hawaii Area (HAAX)	$109,238,000	$28,218,000	$137,456,000	$128,098,000	6.8%


5-Year Retail Sales Summary/$ Millions

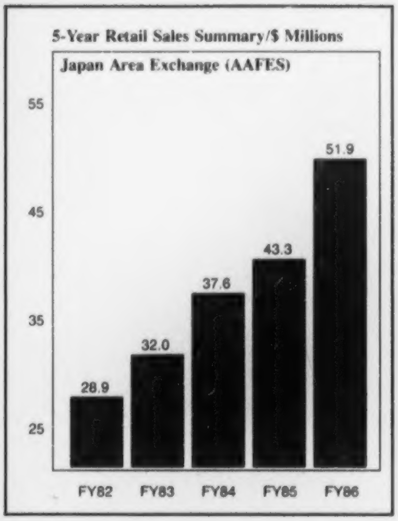

5-Year Services Sales Summary/$ Millions


5-Year Total Sales Summary/$ Millions

AAFES Exchange Sales—FY86

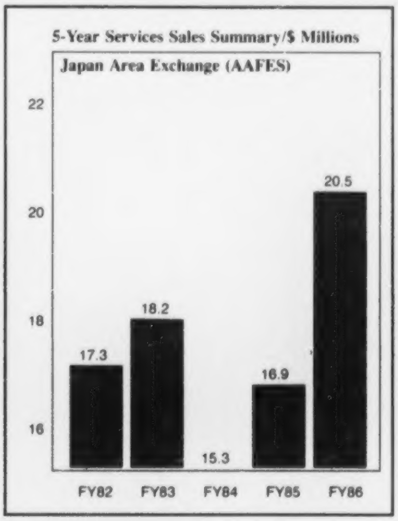
Japan

Exchange Area	FY 86 $ Sales Retail	 Services & Other	 Total	Total $ Sales FY 85	Total Sales % Change 86 vs 85
Japan Area (JAAX)	$51,905,000	$20,545,000	$72,450,000	$60,178,000	16.9%



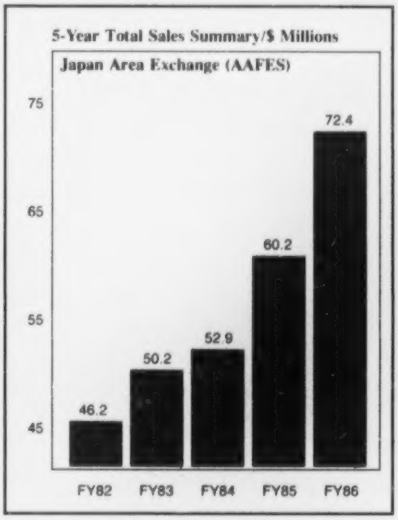
5-Year Retail Sales Summary/$ Millions

Japan Area Exchange (AAFES)



5-Year Services Sales Summary/$ Millions

Japan Area Exchange (AAFES)



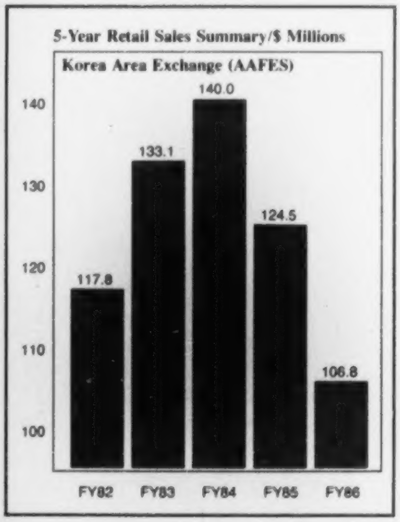
5-Year Total Sales Summary/$ Millions

Japan Area Exchange (AAFES)

AAFES Exchange Sales—FY86

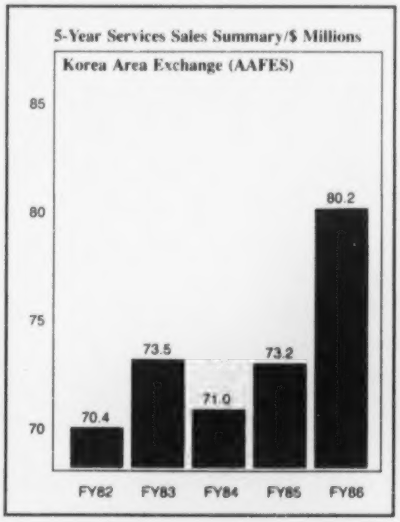
Korea

Exchange Area	FY 86 $ Sales Retail	 Services & Other	 Total	Total $ Sales FY 85	Total Sales % Change 86 vs 85
Korea Area (KOAX)	$106,799,000	$80,186,000	$186,985,000	$197,656,000	−5.7%



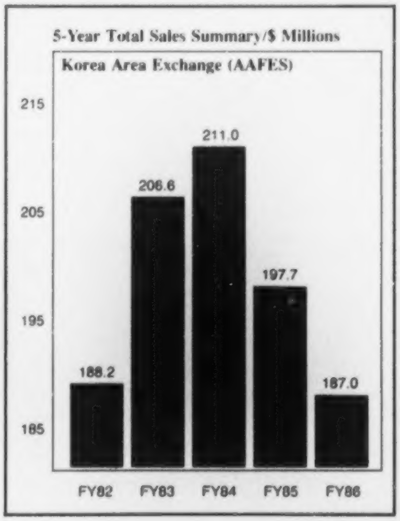
5-Year Retail Sales Summary/$ Millions

Korea Area Exchange (AAFES)



5-Year Services Sales Summary/$ Millions

Korea Area Exchange (AAFES)



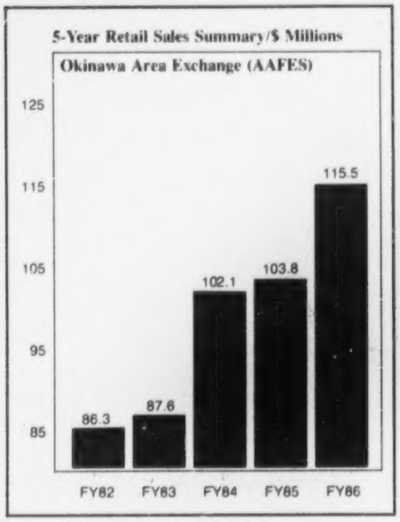
5-Year Total Sales Summary/$ Millions

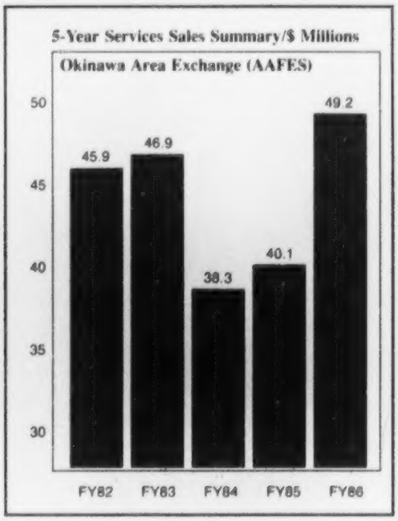
Korea Area Exchange (AAFES)

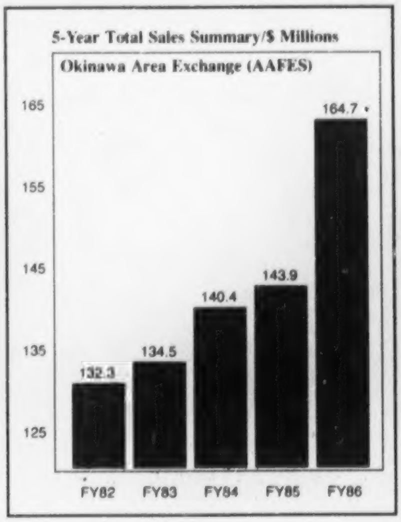
AAFES Exchange Sales—FY86

Okinawa

Exchange Area	FY 86 $ Sales Retail	FY 86 $ Sales Services & Other	FY 86 $ Sales Total	Total $ Sales FY 85	Total Sales % Change 86 vs 85
Okinawa Area (OKAX)	$115,492,000	$49,182,000	$164,674,000	$143,866,000	12.6%


5-Year Retail Sales Summary/$ Millions


5-Year Services Sales Summary/$ Millions


5-Year Total Sales Summary/$ Millions

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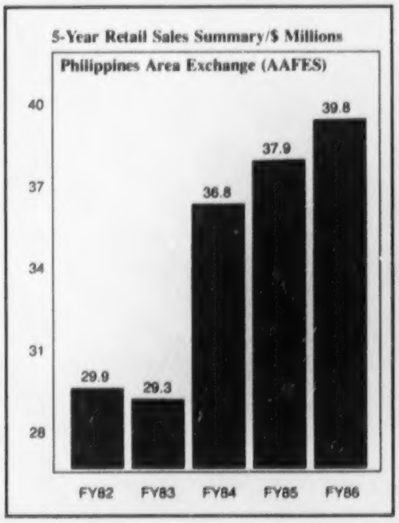
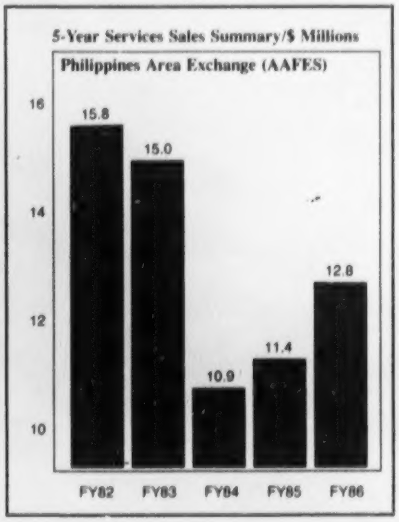
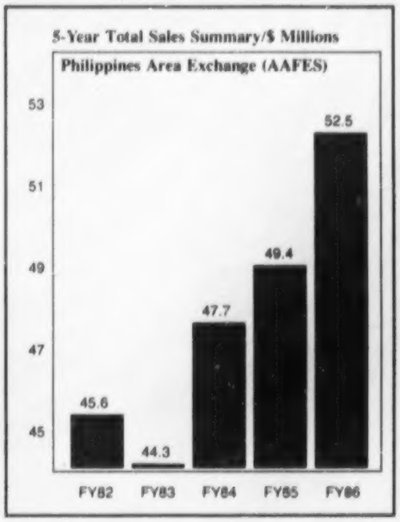
AAFES Exchange Sales—FY86

Philippines

Exchange Area	FY 86 $ Sales Retail	FY 86 $ Sales Services & Other	FY 86 $ Sales Total	Total $ Sales FY 85	Total Sales % Change 86 vs 85
Philippines Area (PHAX)	$39,772,000	$12,763,000	$52,535,000	$49,374,000	6.0%


5-Year Retail Sales Summary/$ Millions
Philippines Area Exchange (AAFES)


5-Year Services Sales Summary/$ Millions
Philippines Area Exchange (AAFES)


5-Year Total Sales Summary/$ Millions
Philippines Area Exchange (AAFES)

AAFES

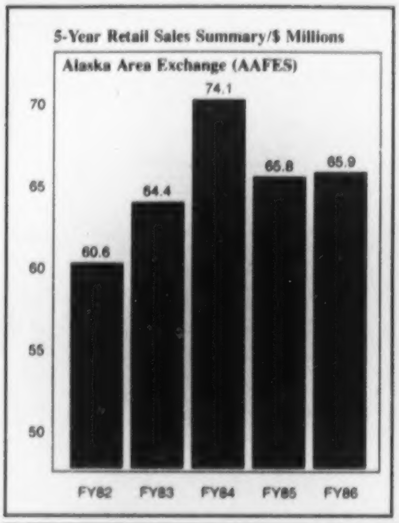
Totals

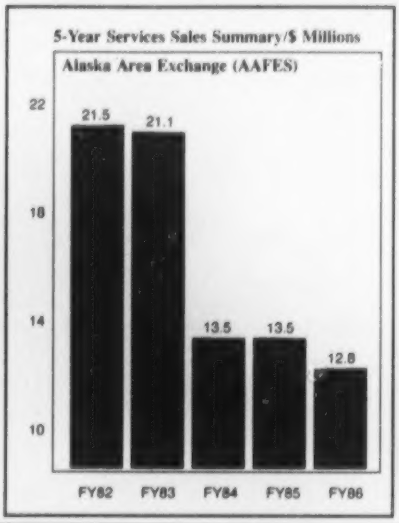
	FY 86 $ Sales Retail	FY 86 $ Sales Services & Other	FY 86 $ Sales Total	Total $ Sales FY 85	Total Sales % Change 86 vs 85
AAFES Pacific Totals	**$627,686,000**	**$229,864,000**	**$857,550,000**	**$604,925,000**	**29.5%**

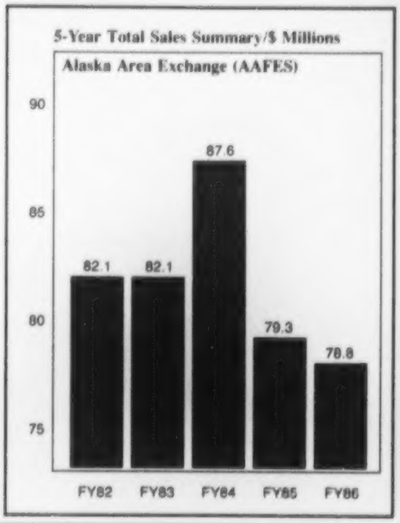
AAFES Exchange Sales—FY86 (Other—Overseas)

Alaska

Exchange Area	FY 86 $ Sales Retail	FY 86 $ Sales Services & Other	FY 86 $ Sales Total	Total $ Sales FY 85	Total Sales % Change 86 vs 85
Elmendorf AFB/Fort Richardson (Anchorage)	40,180,000	8,785,000	48,965,000	48,997,000	−0.1
Nothern Alaska	24,079,000	3,659,000	27,738,000	28,738,000	−3.6
"Remote Sites"	1,698,000	384,000	2,082,000	1,570,000	24.6
AKAX Totals	**$65,957,000**	**$12,828,000**	**$78,785,000**	**$79,305,000**	**−0.7%**


5-Year Retail Sales Summary/$ Millions


5-Year Services Sales Summary/$ Millions


5-Year Total Sales Summary/$ Millions

AAFES Exchange Sales—FY86

Azores

Store	FY 86 $ Sales Retail	 Services & Other	 Total	Total $ Sales FY 85	Total Sales % Change 86 vs 85
Azores	$8,613,000	$2,234,000	$10,847,000	$10,194,000	6.0%

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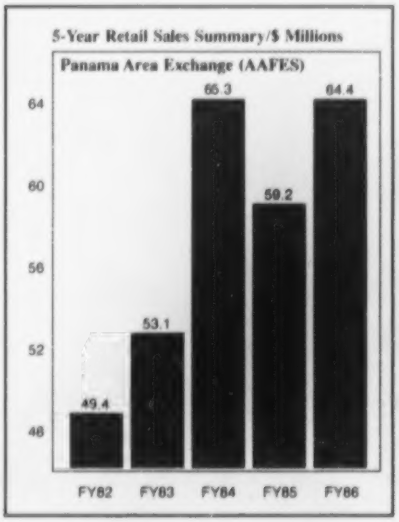
AAFES Exchange Sales—FY86

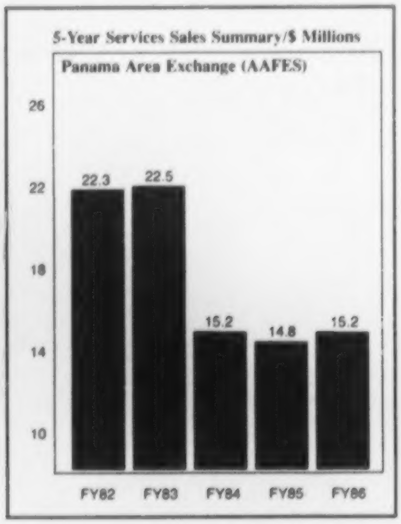
Greenland

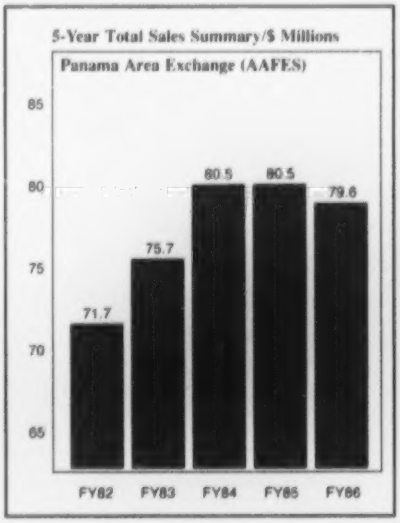
Store	FY 86 $ Sales Retail	Services & Other	Total	Total $ Sales FY 85	Total Sales % Change 86 vs 85
Sonderstrom AB	1,693,000	48,000	1,741,000	1,352,000	22.3
Thule AB	3,380,000	72,000	3,452,000	2,681,000	22.3
Totals	**$5,073,000**	**$120,000**	**$5,193,000**	**$4,033,000**	**22.3%**

Panama

Store	FY 86 $ Sales Retail	Services & Other	Total	Total $ Sales FY 85	Total Sales % Change 86 vs 85
Panama Area (PAAX)	$64,363,000	$15,245,000	$79,608,000	$73,963,000	7.1%


5-Year Retail Sales Summary/$ Millions


5-Year Services Sales Summary/$ Millions


5-Year Total Sales Summary/$ Millions

AAFES Exchange Sales—FY86

Puerto Rico

Store	FY 86 $ Sales Retail	Services & Other	Total	Total $ Sales FY 85	Total Sales % Change 86 vs 85
Puerto Rico (PRAX)	$38,665,000	$2,206,000	$40,871,000	$37,995,000	7.0%

Totals

	FY 86 $ Sales Retail	Services & Other	Total	Total $ Sales FY 85	Total Sales % Change 86 vs 85
Overseas Totals	**$1,769,693,000**	**$547,736,000**	**$2,344,429,000**	**$2,078,533,995**	**11.3%**
Worldwide Totals	**$4,036,340,000**	**$1,078,492,000**	**$5,114,832,000**	**$4,820,508,995**	**5.8%**

Coast Guard NAFA Sales—FY86

Coast Guard Cutters

	FY 86 $ Sales			Total $ Sales FY 85	Total Sales % Change 86 vs 85
Store	Retail	Services & Other	Total		
Coast Guard Cutters	$347,262	$106,904	$454,166	$436,472	3.9%
CONUS					
Alameda, CA	850,834	326,363	1,177,197	1,219,261	−3.6
Alexandria, VA	28,674	72,412	101,086	112,587	−11.4
Atlantic Beach, NC	76,406	21,819	98,225	57,423	41.5
Baltimore, MD	416,560	291,466	708,026	832,433	−17.6
Boston, MA	1,290,550	333,663	1,624,213	1,547,223	4.7
Brooklyn, NY	2,795,832	1,179,723	3,975,555	3,469,890	12.7
Buffalo, NY	209,754	7,087	216,841	204,023	5.9
Cape Cod, MA	4,413,116	4,809,565	9,222,681	8,815,830	4.4
Cape May, NJ	2,683,423	763,918	3,447,341	3,150,083	8.6
Charleston, SC	573,660	536,383	1,110,043	1,100,553	0.9
Clearwater, FL	1,318,434	417,728	1,736,162	1,820,471	−4.9
Cleveland, OH (MSo)	0	987,594	987,594	1,030,376	−4.3
Cleveland, OH	681,758	2,827,514	3,509,272	3,562,646	−1.5
Detroit, MI	639,019	69,354	708,373	642,498	9.3
Elizabeth City, NC	1,527,469	509,471	2,036,940	1,954,822	4.0
Galena Park, TX	56,386	11,205	67,591	52,766	21.9
Galveston, TX	346,703	117,996	464,699	388,842	16.3
Gloucester City, NJ	400,209	135,961	536,170	593,816	−10.8
Governors Island, NY	3,140,678	2,428,509	5,569,187	5,409,531	2.9
Long Island, NY	309,319	105,463	414,782	484,267	−16.8
Mayport, FL	953,628	9,709	963,337	1,013,942	−5.3
McKinleyville, CA	85,936	6,881	92,817	92,234	0.6
Miami Beach, FL	378,452	129,934	508,386	529,103	−4.1
Milwaukee, WI	142,270	7,443	149,713	156,837	−4.8
Mobile (Base), AL	1,012,109	724,843	1,736,952	2,251,411	−29.6
Mobile, AL (ATC)	1,485,473	7,227,446	8,712,919	9,629,580	−10.5
Muskegon, MI	352,371	86,678	439,049	450,383	−2.6
New Haven, CT	3,619,359	1,633,983	5,253,342	5,296,733	−0.8
New Orleans, LA	355,193	46,962	402,155	369,884	8.0
North Bend, OR	92,695	381,410	474,105	421,538	11.1
Opa Locka, FL	2,601,433	2,172,139	4,773,572	4,940,721	−3.5
Petaluma, CA	617,954	328,283	946,237	1,137,397	−20.2
Port Angeles, WA	418,560	335,571	754,131	695,820	7.7
Portland, OR	174,969	147,031	322	153,011	52.5
Portsmouth, VA	819,616	432,246	1,251,862	1,285,631	−2.7
San Diego, CA	47,600	13,676	61,276	75,183	−22.7
San Pedro, CA	130,236	31,459	161,695	197,709	−22.3
Sault St. Marie, MI	135,747	22,297	158,044	187,875	−18.9
Seattle, WA	1,429,345	497,096	1,926,441	1,543,745	19.9
South Portland, ME	2,089,854	687,096	2,776,950	2,789,888	−0.5
St. Louis, MO	358,608	154,338	512,946	563,268	−9.8
St. Petersburg, FL	4,789,364	2,239,478	7,028,842	7,123,553	−1.3
Traverse City, MI	214,806	583,539	798,345	836,749	−4.8
Warrenton, OR	550,292	747,628	1,297,920	1,317,998	−1.5
Yorktown, VA	1,359,652	591,607	1,951,259	1,920,948	1.6
CONUS Totals	**$45,974,306**	**$35,191,967**	**$81,166,273**	**$81,430,482**	**−0.3%**

Coast Guard NAFA Sales—FY86

Overseas

	FY 86 $ Sales			Total $ Sales FY 85	Total Sales % Change 86 vs 85
Alaska	Retail	Services & Other	Total		
Juneau, AK	311,803	158,960	470,763	631,467	−34.1
Ketchikan, AK	548,281	102,347	650,628	584,154	10.2
Kodiak, AK	4,456,216	1,788,574	6,244,790	5,730,062	8.2
Sitka, AK	283,033	71,445	354,478	364,219	−2.7
Alaska Totals	**$5,599,333**	**$2,121,326**	**$7,720,659**	**$7,309,902**	**5.3%**
Hawaii					
Barbers Point, HI	0	99,870	99,870	138,298	−38.5
Honolulu, HI	2,484,281	2,229,877	4,714,158	4,470,949	5.2
Hawaii Totals	**$2,484,281**	**$2,329,747**	**$4,814,028**	**$4,609,247**	**4.3%**
Italy					
Lampedusa	5,613	13,267	18,880	24,192	−28.1
Sellia Marina	26,330	20,950	47,280	24,518	48.1
Italy Totals	**$31,943**	**$34,217**	**$66,160**	**$48,710**	**26.4%**
Puerto Rico					
Aquadilla	3,633,964	2,832,464	6,466,428	5,920,099	8.4
San Juan	2,453,865	1,259,775	3,713,640	3,428,052	7.7
Puerto Rico Totals	**$6,087,829**	**$4,092,239**	**$10,180,068**	**$9,348,151**	**8.2%**
Spain					
Estaritt	32,396	116	32,512	44,890	−38.1
Turkey					
Kargabarun	10,426	1,130	11,556	11,320	2.0
United Kingdom					
Sylt	16,641	1,570	18,211	20,323	−11.6
Totals					
Overseas Totals	**$14,262,849**	**$8,580,345**	**$22,843,194**	**$21,293,699**	**6.4%**
Worldwide Totals	**$60,584,417**	**$43,879,216**	**$104,463,633**	**$103,259,497**	**1.2%**

Navy Exchange Sales—FY 86

Summary of Sales by Retail Department

	CONUS		Overseas		Worldwide	
Department/Dept. Code	**$ Sales**	**%**	**$ Sales**	**%**	**$ Sales**	**%**
Candy & Confections/A-1	12,342,246	1.6	5,522,415	1.5	17,864,662	1.6
Tobacco & Smoking Accessories/A-2	88,226,636	11.5	13,801,082	3.8	102,027,719	9.0
Convenience Foods/A-4	35,456,195	4.6	18,527,071	5.1	53,983,267	4.8
Beverages (Beer and Soda)/A-6	45,512,468	5.9	22,033,357	6.1	67,545,825	6.0
Film & Accessories/A-7	7,063,403	0.9	2,876,617	0.8	9,940,020	0.9
Records & Tapes/A-8	12,372,854	1.6	14,353,069	4.0	26,725,923	2.4
Cameras & Photo Equipment/B-1	10,251,180	1.3	8,190,965	2.3	18,442,145	1.6
Housewares/B-2	11,950,127	1.6	5,388,839	1.5	17,338,966	1.5
Sporting Goods/B-3	11,945,901	1.6	7,372,169	2.0	19,318,071	1.7
Electrical Appliances/B-4	18,216,176	2.4	16,908,693	4.7	35,124,870	3.1
Consumer Electronics/B-5	59,802,247	7.8	66,679,955	18.4	126,482,202	11.2
Home Furnishings & Giftware/B-8	15,662,155	2.0	15,223,348	4.2	30,885,503	2.7
Furniture/B-9	4,154,991	0.5	19,195,250	5.3	23,350,242	2.1
Luggage & Leather Goods/C-1	9,235,349	1.2	2,382,862	0.7	11,618,211	1.0
Stationery/C-2	13,746,649	1.8	3,935,168	1.1	17,681,817	1.6
Party Goods & Greeting Cards/C-3	9,884,476	1.3	3,674,336	1.0	13,558,813	1.2
Hardware & Pet Supplies/C-4	16,229,642	2.1	4,182,233	1.2	20,411,876	1.8
Toys & Wheel Goods/C-5	16,135,792	2.1	9,086,574	2.5	25,222,366	2.2
Books & Periodicals/C-7	12,860,808	1.7	5,542,714	1.5	18,403,522	1.6
Auto Accessories/C-8	20,056,883	2.6	7,008,242	1.9	27,065,126	2.4
Garden Supplies & Outdoor Living/C-9	23,329,753	3.0	4,579,660	1.3	27,909,414	2.5
Toiletries & Drug/D-1	36,960,968	4.8	11,688,354	3.2	48,649,322	4.3
Jewelry/D-2	20,220,323	2.6	12,565,993	3.5	32,786,316	2.9
Household Supplies/D-3	12,747,653	1.7	5,592,381	1.5	18,340,035	1.6
Watches & Accessories/D-4	9,664,203	1.3	4,310,851	1.2	13,975,054	1.2
Fragrances & Cosmetics/D-5	17,741,154	2.3	5,790,878	1.6	23,532,033	2.1
Men's Wear & Accessories/E-2	59,508,660	7.8	16,867,552	4.6	76,376,212	6.8
Intimate Apparel/E-3	17,327,966	2.3	4,633,846	1.3	21,961,812	1.9
Domestics/E-4	14,381,303	1.9	6,101,275	1.7	20,482,579	1.8
Infants and Toddler's Wear/E-5	10,382,967	1.4	4,352,106	1.2	14,735,073	1.3
Family Shoes/E-7	18,161,670	2.4	6,096,026	1.7	24,257,696	2.1
Women's Ready to Wear/E-8	29,823,411	3.9	9,020,788	2.5	38,844,199	3.4
Fabrics & Sewing Accessories/F-2	0	/a	1,943,255	0.5	1,943,255	0.2
Girls Wear/G-1	8,080,685	1.1	2,542,813	0.7	10,623,499	0.9
Boys Wear/G-2	7,913,449	1.0	2,445,984	0.7	10,359,434	0.9
Department Sales Adjustments*						
All "B" Departments/B-6	0	/a	2,700,982	0.7	2,700,982	0.2
All "C" Departments/C-6	979,221	0.1	131,412	/a	1,110,633	0.1
All "D" Departments/D-6	0	/a	65,585	/a	65,585	/a
All "E" Departments/E-6	0	/a	1,057,511	0.3	1,057,511	0.1
Misc. Retail Departments/E-9	1,560,270	0.2	1,923,220	0.5	3,483,491	0.3
Retail Subtotals	**$719,889,834**	**93.9%**	**$356,295,431**	**98.2%**	**$1,076,185,281**	**95.3%**
Uniforms & Accessories/E-1	46,452,727	6.1	6,597,424	1.8	53,050,152	4.7
Retail Department Totals	**$766,342,561**	**100.0%**	**$362,892,855**	**100.0%**	**$1,129,235,433**	**100.0%**

Note: Navy Exchange sales for FY86 are preliminary and unaudited.
/a Less than one-tenth of one percent.
* Represents sales that were rung up by smaller exchanges without a key for each department.

NAVRESSO Exchange Sales—FY86

Summary of Sales by Service Department

Department	CONUS	Overseas	Worldwide
Barber Shop/J-1	9,127,519	2,131,158	11,258,677
Beauty Shop/J-2	2,163,099	1,525,813	3,688,913
Gasoline/Fuel/J-3	72,388,551	21,024,282	93,413,063
Auto Services & Labor/J-5	5,537,705	1,940,965	7,115,121
Optical/K-2	7,597,124	1,148,616	8,387,130
Flower Shop/K-3	6,396,293	1,578,575	7,974,868
Food Service/K-4	57,669,225	26,561,760	84,230,986
Retail Clothing (Uniforms)/L-1	17,361,065	3,449,511	20,810,577
Laundry Dry Cleaning/M-1	14,412,944	4,091,596	18,504,541
Personalized Services/M-2	23,517,308	15,786,270	39,303,579
Vending Machines/M-3	62,437,410	14,986,375	77,423,785
Total Services	**$277,886,315**	**$94,775,415**	**$372,111,243**
Navy Lodges	**$9,510,840**	**$2,156,148**	**$11,666,988**
Concessionaire Sales	**$93,349,273**	**$30,195,047**	**$123,544,330**

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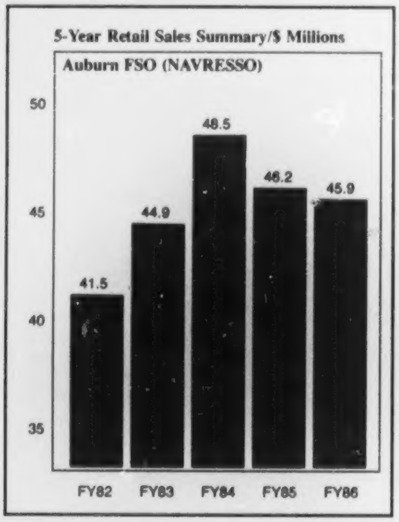
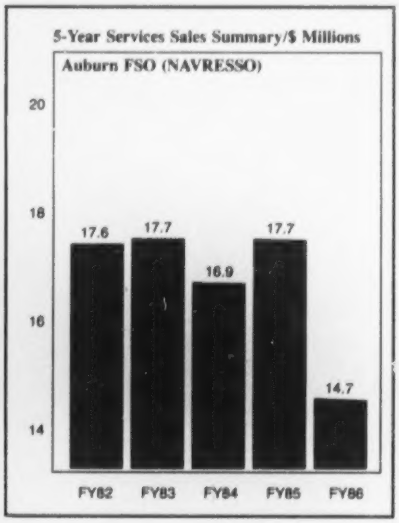
NAVRESSO Exchange Sales—FY86
Continental U.S.

Auburn FSO

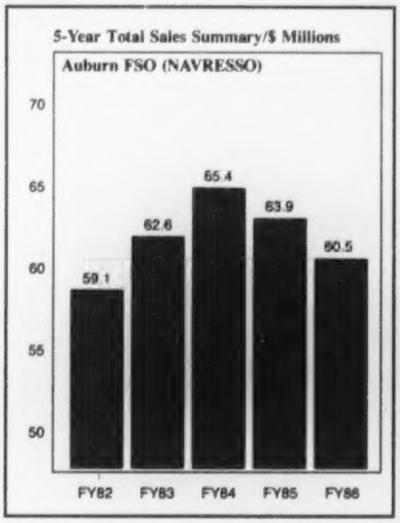
Store	FY 86 $ Sales Retail	 Services & Other	 Total	Total $ Sales FY 85	Total Sales % Change 86 vs 85
Bangor (NSB), WA	9,170,776	5,063,880	14,234,656	14,112,703	0.9
Bremerton (PSNS), WA	7,928,976	2,200,633	10,129,609	12,511,526	−23.5
Coos Head (NF), OR	61,041	1,512	62,553	74,039	−18.4
Pacific Beach (NF), WA	111,750	19,665	131,415	119,588	9.0
Seattle (NS), WA	14,280,886	2,445,850	16,726,736	16,862,705	−0.8
Whidbey Island (NAS), WA	14,312,248	4,945,086	19,257,334	20,211,004	−5.0
Auburn FSO Totals	**$45,865,677**	**$14,676,626**	**$60,542,303**	**$63,891,565**	**−5.5%**


5-Year Retail Sales Summary/$ Millions

Auburn FSO (NAVRESSO)


5-Year Services Sales Summary/$ Millions

Auburn FSO (NAVRESSO)


5-Year Total Sales Summary/$ Millions

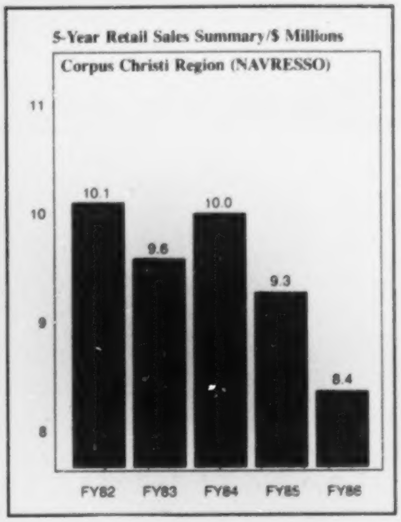
Auburn FSO (NAVRESSO)

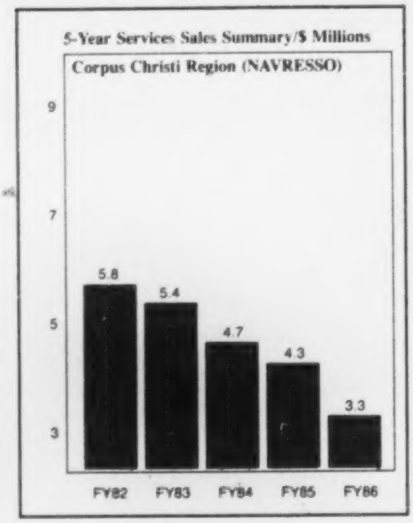
Navy Exchange Sales—FY86

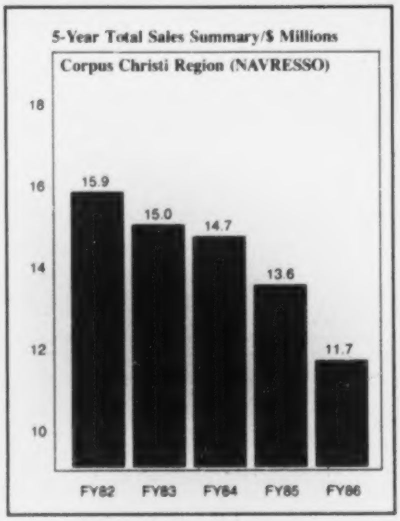
Corpus Christi Region

Store	FY 86 $ Sales Retail	 Services & Other	 Total	Total $ Sales FY 85	Total Sales % Change 86 vs 85
Beeville (NAS), TX[b]	1,492,345	873,476	2,365,821	2,681,618	−13.3
Corpus Christi (NAS), TX[m]	5,656,181	1,635,336	7,291,517	8,282,831	−13.6
Kingsville (NAS), TX[b]	1,263,697	771,341	2,035,038	2,615,479	−28.5
Region Totals	**$8,412,223**	**$3,280,153**	**$11,692,376**	**$13,579,928**	**−16.1%**

Notes: [m]Main Exchange; [b]Branch Exchange



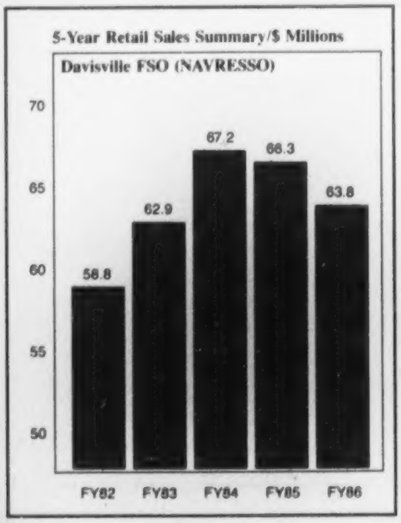


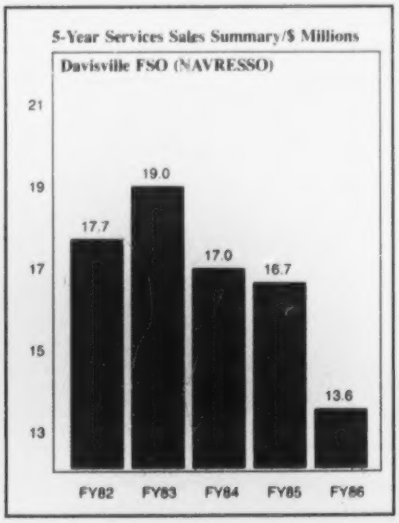


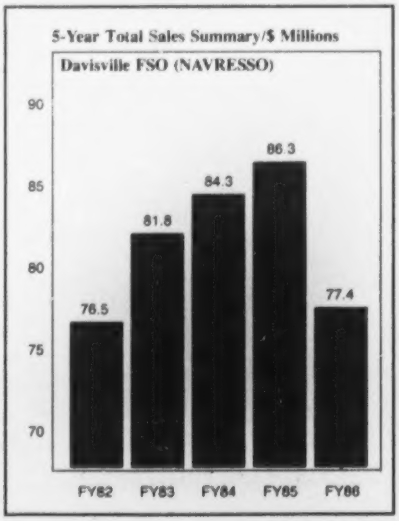
Navy Exchange Sales—FY86

Davisville FSO

Store	FY 86 $ Sales Retail	 Services & Other	 Total	Total $ Sales FY 85	Total Sales % Change 86 vs 85
Brooklyn (NS), NY	980,633	60,969	1,041,602	1,529,667	−46.9
Brunswick (NAS), ME	7,321,579	1,824,770	9,146,349	9,231,431	−0.9
Cutler (NCU), ME	289,514	55,518	345,032	367,878	−6.6
Mitchell Field (NHA), NY	8,177,936	621,129	8,799,065	9,195,599	−4.5
New London (NSB), CT	25,300,286	6,664,769	31,965,055	33,548,169	−5.0
Newport (NETC), RI	15,373,103	3,635,887	19,008,990	19,592,236	−3.1
Portsmouth (PNS), NH	494,425	219,165	713,590	721,955	−1.2
Scotia (NAU), NY	1,562,184	37,117	1,599,301	1,737,732	−8.7
South Weymouth (NAS), MA	3,939,987	317,533	4,257,520	4,730,468	−11.1
Winter Harbor (NSFGA), ME	339,935	192,364	532,299	633,493	−19.0
Davisville FSO Totals	**$63,779,582**	**$13,629,221**	**$77,408,803**	**$81,288,628**	**−5.0%**





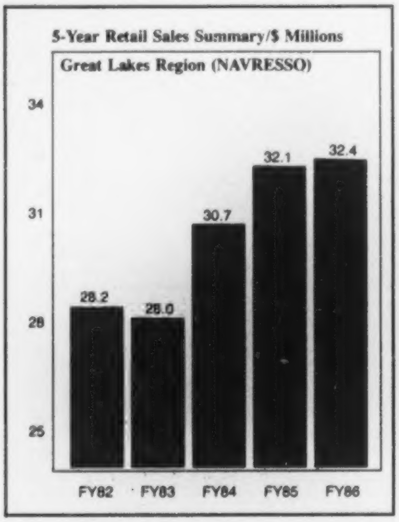


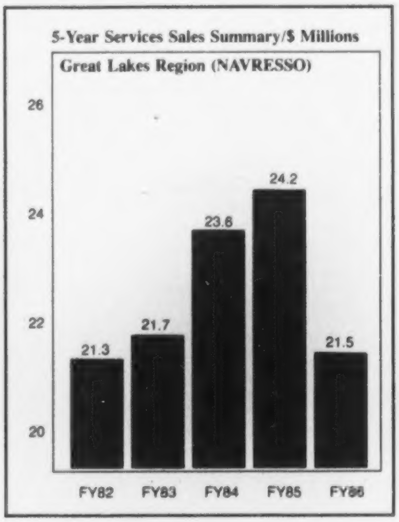
Navy Exchange Sales—FY86

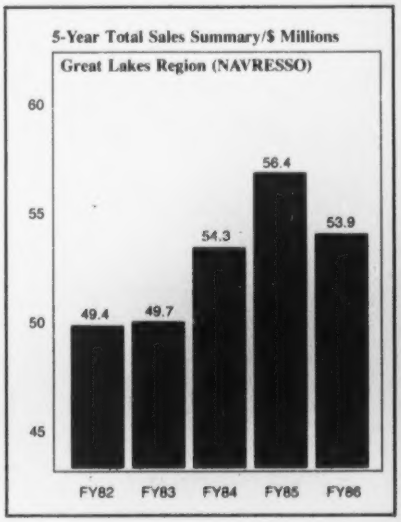
Great Lakes Region

Store	FY 86 $ Sales Retail	 Services & Other	 Total	Total $ Sales FY 85	Total Sales % Change 86 vs 85
Crane (NWSC), IN[b]	293,060	58,108	351,168	389,421	−10.9
Glenview (NAS), IL[b]	1,471,957	651,450	2,123,407	2,273,009	−7.0
Great Lakes (NTC), IL[m]	29,922,230	19,649,308	49,571,538	51,628,901	−4.2
Great Lakes (NH), IL[b]	711,495	1,118,314	1,829,809	2,112,387	−15.4
Region Totals	**$32,398,742**	**$21,477,180**	**$53,875,922**	**$56,403,718**	**−4.7%**

Notes: [m]Main Exchange; [b]Branch Exchange


5-Year Retail Sales Summary/$ Millions

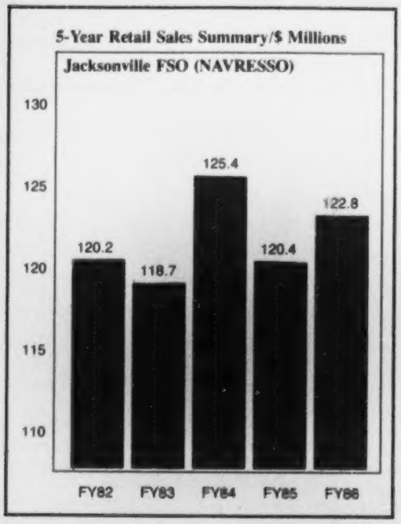

5-Year Services Sales Summary/$ Millions

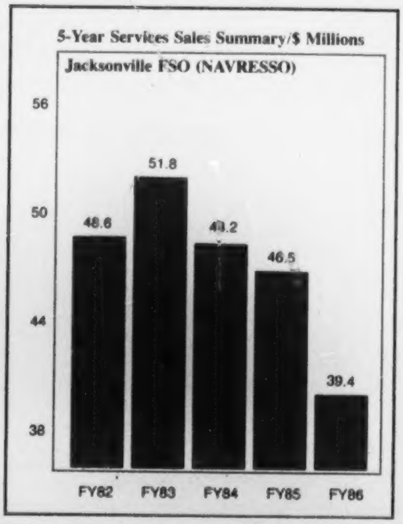

5-Year Total Sales Summary/$ Millions

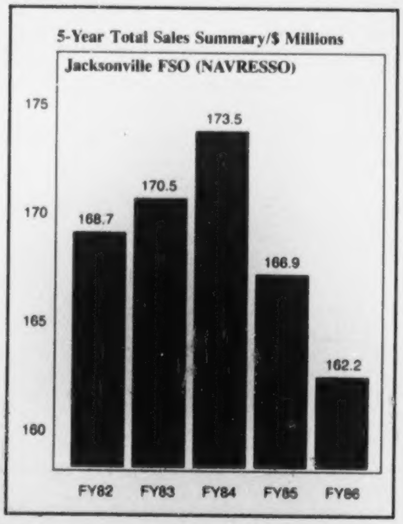
Navy Exchange Sales—FY86

Jacksonville FSO

Store	FY 86 $ Sales Retail	 Services & Other	 Total	Total $ Sales FY 85	Total Sales % Change 86 vs 85
Athens (NSCS), GA	1,961,629	460,323	2,421,952	2,204,021	9.0
Atlanta (NAS), GA	1,937,926	636,246	2,574,172	2,652,096	−3.0
Beaufort (NH), SC	593,798	345,877	939,675	1,014,235	−7.9
Cecil Field (NAS), FL	6,055,613	3,423,905	9,479,518	10,219,229	−7.8
Charleston (NRMC), SC	240,629	330,484	571,113	663,573	−16.2
Charleston (NS), SC	14,186,106	5,020,278	19,206,384	19,480,895	−1.4
Charleston (NWS), SC	5,867,604	1,481,293	7,348,897	6,959,625	5.3
Jacksonville (NAS), FL	26,853,206	8,127,922	34,981,128	36,732,020	−5.0
Key West (NAS), FL	4,744,179	1,632,957	6,377,136	6,182,488	3.1
Kings Bay (NSB), GA	2,298,698	1,263,654	3,562,352	3,916,175	−9.9
Mayport (NS), FL	10,600,066	4,315,231	14,915,297	15,260,538	−2.3
Orlando (NTC), FL	47,500,785	12,302,495	59,803,280	61,569,123	−3.0
Jacksonville FSO Totals	**$122,840,239**	**$39,340,665**	**$162,180,904**	**$166,854,018**	**−2.9%**

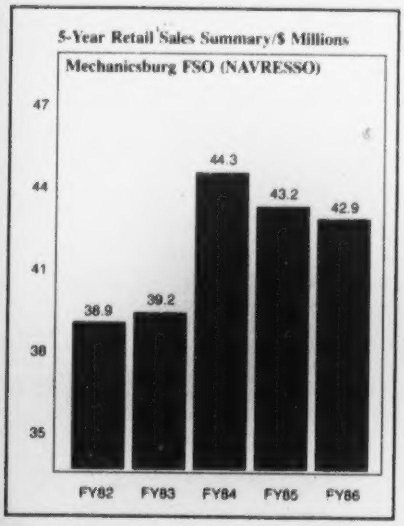

5-Year Retail Sales Summary/$ Millions

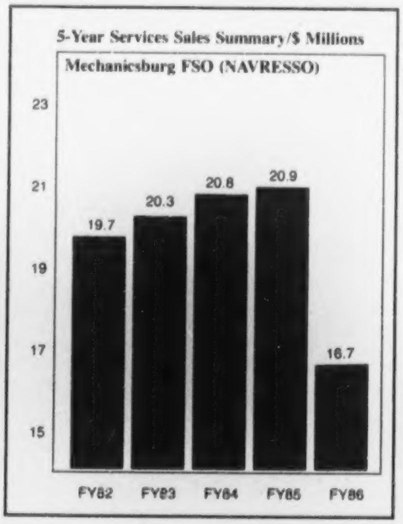

5-Year Services Sales Summary/$ Millions

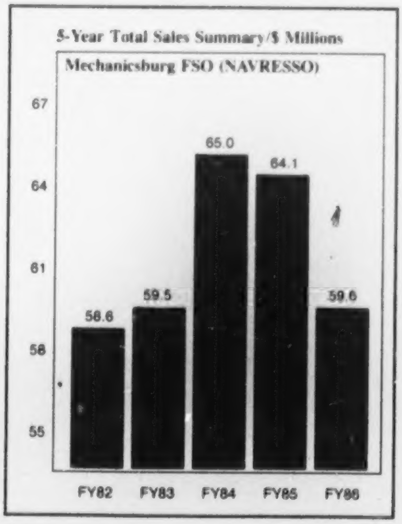

5-Year Total Sales Summary/$ Millions

Mechanicsburg FSO

Store	FY 86 $ Sales Retail	Services & Other	Total	Total $ Sales FY 85	Total Sales % Change 86 vs 85
Annapolis (NS), MD	4,557,245	1,111,682	5,668,927	6,051,662	−6.8
Arlington (NUC), VA	1,367,740	137,300	1,505,040	1,430,741	4.9
Bethesda (NMC), MD	8,558,839	3,729,448	12,288,287	12,581,330	−2.4
Colts Neck (NWS), NJ	449,709	296,479	746,188	760,234	−1.9
Dahlgren (NSWC), VA	416,657	727,602	1,144,259	1,215,306	−6.2
Lakehurst (NAEC), NJ	338,763	195,692	534,455	611,714	−14.5
Lakehurst (NAEC), NJ	2,866,552	981,066	3,847,618	3,928,865	−2.1
Mechanicsburg (NSPCC), PA	683,154	24,337	707,491	729,684	−3.1
Patuxent River (NAS), MD	6,567,725	2,744,387	9,312,112	10,108,676	−8.6
Philadelphia (ASO), PA	456,080	3,898	459,978	452,529	1.6
Philadelphia (NRMC), PA	380,685	136,812	517,497	575,963	−11.3
Philadelphia (NS), PA	10,717,442	3,479,130	14,196,572	15,639,128	−10.2
Warminster (NADC), PA	433,593	93,716	527,309	526,587	0.1
Washington Navy Yard (ND), DC	1,119,171	2,413,682	3,532,853	4,033,607	−14.2
Willow Grove (NAS), PA	3,975,298	611,334	4,586,632	5,475,137	−19.4
Mechanicsburg FSO Totals	**$42,888,653**	**$16,686,565**	**$59,575,218**	**$64,121,163**	**−7.6%**


5-Year Retail Sales Summary/$ Millions

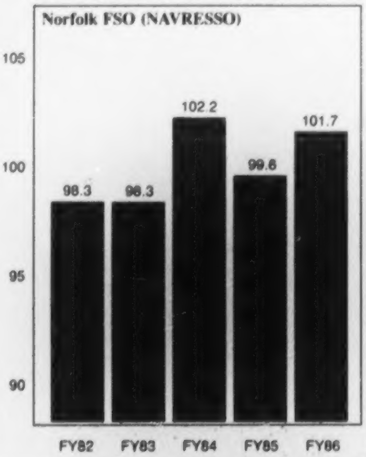

5-Year Services Sales Summary/$ Millions


5-Year Total Sales Summary/$ Millions

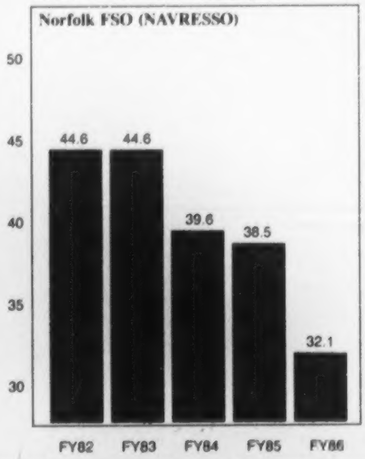
Norfolk FSO

Store	FY 86 $ Sales			Total $ Sales FY 85	Total Sales % Change 86 vs 85
	Retail	Services & Other	Total		
Chesapeake (NSGA), VA	412,713	191,248	603,961	641,808	−6.3
Little Creek (NAB), VA	34,505,100	5,845,964	40,351,064	40,672,938	−0.8
Norfolk (AFHSA), VA	1,088,439	1,181,955	2,270,394	2,305,075	−1.5
Norfolk (NB), VA	35,892,863	13,598,862	49,491,725	51,432,914	−3.9
Norfolk (NUMOC), VA	3,053,949	0	3,053,949	2,436,232	20.2
Oceana (NAS), VA	14,649,163	5,023,246	19,672,409	20,391,092	−3.7
Portsmouth (NH), VA	1,465,493	1,090,362	2,555,855	3,449,519	−35.0
Portsmouth (NNS), VA	6,300,865	1,841,241	8,142,106	8,886,158	−9.1
Sugar Grove (NRS), WV	125,677	50,222	175,899	196,592	−11.8
Virginia Beach (FCTC), VA	2,621,943	2,330,021	4,951,964	5,168,645	−4.4
Yorktown (NWS), VA	1,545,931	977,762	2,523,693	2,552,719	−1.2
Norfolk FSO Totals	**$101,662,136**	**$32,130,883**	**$133,793,019**	**$138,133,692**	**−3.2%**

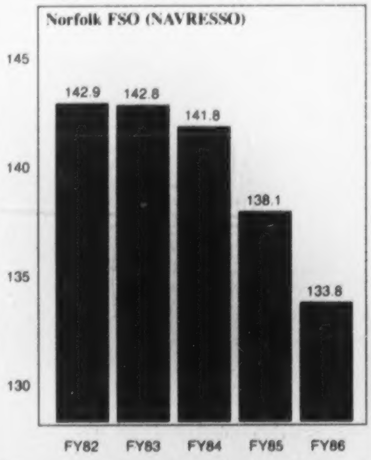
5-Year Retail Sales Summary/$ Millions



5-Year Services Sales Summary/$ Millions

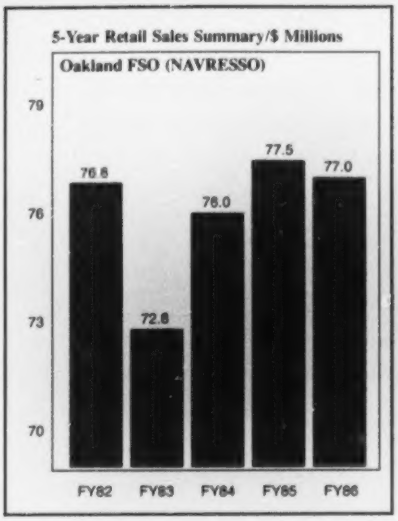


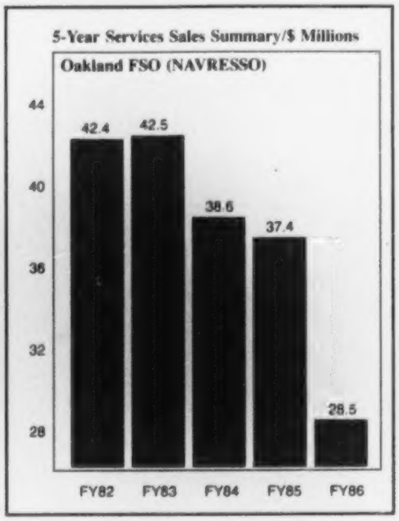
5-Year Total Sales Summary/$ Millions

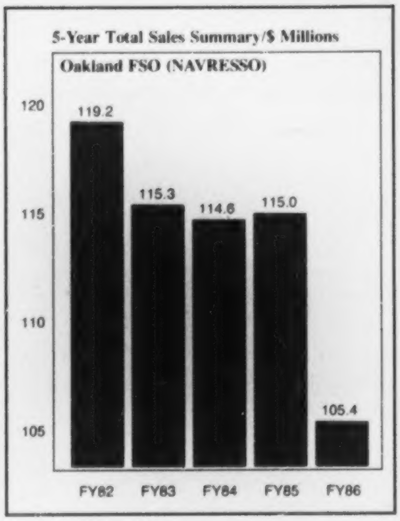


Oakland FSO

Store	FY 86 $ Sales			Total $ Sales FY 85	Total Sales % Change 86 vs 85
	Retail	Services & Other	Total		
Alameda (NAS), CA	17,803,872	4,458,413	22,262,285	24,211,865	−8.8
Concord (NWS), CA	706,026	395,950	1,101,976	1,326,478	−20.4
Fallon (NAS), NV	1,907,090	1,480,307	3,387,397	3,329,990	1.7
Ferndale (NF), CA	144,842	72,510	217,352	218,002	−0.3
Lemoore (NAS), CA	8,415,350	4,758,120	13,173,470	13,964,005	−6.0
Mare Island (NS), CA	7,394,850	3,986,303	11,381,153	12,744,020	−12.0
Moffett Field (NAS), CA	19,337,169	5,682,396	25,019,565	27,067,463	−8.2
Monterey (NPGS), CA	8,463,244	2,638,277	11,101,521	11,727,092	−5.6
Novato (DoDHF), CA	5,207,396	1,200,846	6,408,242	7,289,001	−13.7
Oakland (NH), CA	1,892,225	1,078,305	2,970,530	3,702,101	−24.6
Oakland (NSC), CA	340,905	412,793	753,698	897,873	−19.1
Skaggs Island (NSGA), CA	120,629	122,063	242,692	276,353	−13.9
Stockton (NCS), CA	1,311,245	339,201	1,650,446	1,850,123	−12.1
Treasure Island (NS), CA	3,887,997	1,846,784	5,734,781	6,355,152	−10.8
Oakland FSO Totals	**$76,932,840**	**$28,472,268**	**$105,405,108**	**$114,959,518**	**−9.1%**





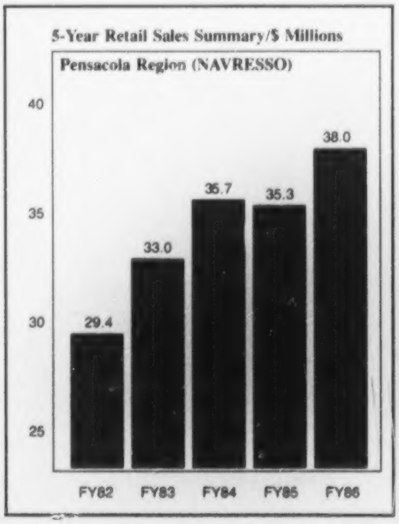


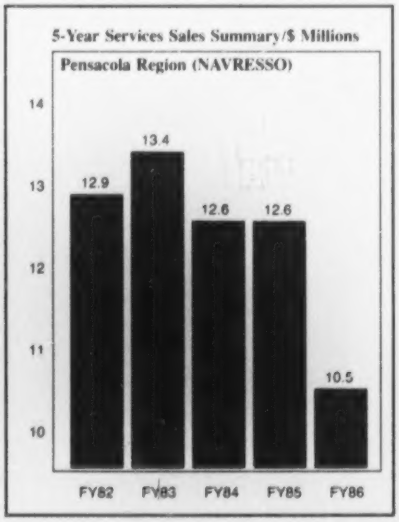
Navy Exchange Sales—FY86

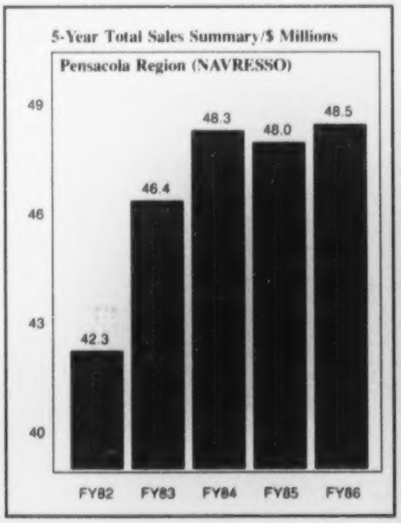
Pensacola Region

Store	FY 86 $ Sales Retail	Services & Other	Total	Total $ Sales FY 85	Total Sales % Change 86 vs 85
Gulfport (NCBC), MS[b]	4,446,875	1,790,775	6,237,650	7,077,136	−13.5
Panama City (NCSC), FL[b]	1,359,888	319,290	1,679,178	1,601,058	4.7
Pascagoula (SSCR), MS[b]	563,751	52,807	616,558	616,029	0.1
Pensacola (NAS), FL[m]	27,936,239	5,704,306	33,640,545	31,855,355	5.3
Pensacola (NTTC), FL[b]	1,414,221	1,329,505	2,743,726	2,945,753	−7.4
Whiting Field (NAS), FL[b]	2,203,707	1,351,096	3,554,803	3,846,888	−8.2
Region Totals	**$37,924,681**	**$10,547,779**	**$48,472,460**	**$47,942,219**	**1.1%**

Notes: [m]Main Exchange; [b]Branch Exchange

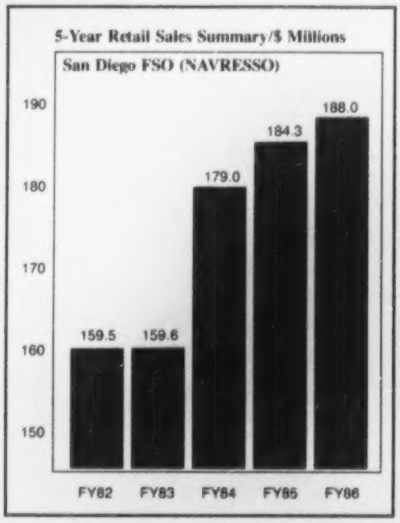


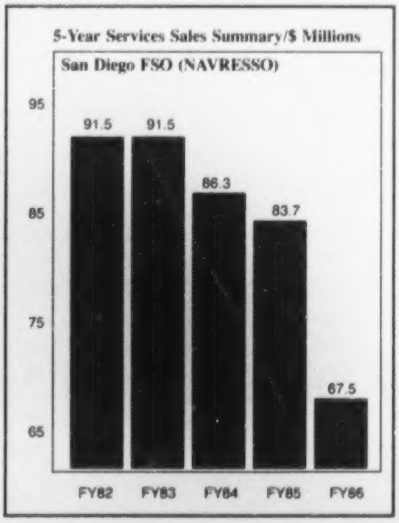


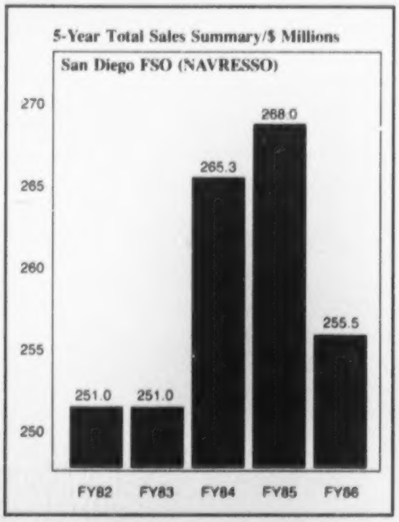


San Diego FSO

Store	FY 86 $ Sales Retail	FY 86 $ Sales Services & Other	FY 86 $ Sales Total	Total $ Sales FY 85	Total Sales % Change 86 vs 85
China Lake (NWC), CA	2,769,811	1,955,505	4,725,316	4,696,800	0.6
Coronado (NAB), CA	3,601,579	2,152,497	5,754,076	7,002,777	−21.7
El Centro (NAF), CA	805,361	456,270	1,261,631	1,173,681	7.0
Imperial Beach (NLF), CA	5,783,420	1,798,237	7,581,657	7,923,583	−4.5
Long Beach (NS), CA	22,248,359	6,320,304	28,568,663	29,312,945	−2.6
Miramar (NAS), CA	39,367,963	10,144,771	49,512,734	51,125,128	−3.3
North Island (NAS), CA	17,183,705	9,228,934	26,412,639	27,264,763	−3.2
Point Mugu (NAS), CA	4,164,169	2,224,108	6,388,277	7,186,326	−12.5
Port Hueneme (NCBC), CA	14,656,600	4,151,754	18,808,354	19,584,185	−4.1
San Clemente Island (NALF), CA	253,299	52,005	305,304	266,302	12.8
San Diego (NMC), CA	2,596,918	2,027,989	4,624,907	5,545,168	−19.9
San Diego (NS), CA	55,081,165	11,848,925	66,930,090	69,992,773	−4.6
San Diego (NSSF), CA	1,628,984	1,177,092	2,806,076	3,337,507	−18.9
San Diego (NTC), CA	17,899,963	13,971,248	31,871,211	33,557,360	−5.3
San Diego FSO Totals	**$188,041,296**	**$67,509,639**	**$255,550,935**	**$267,969,298**	**−4.9%**


5-Year Retail Sales Summary/$ Millions


5-Year Services Sales Summary/$ Millions


5-Year Total Sales Summary/$ Millions

Stand Alone Exchanges

Store	FY 86 $ Sales Retail	FY 86 $ Sales Services & Other	FY 86 $ Sales Total	Total $ Sales FY 85	Total Sales % Change 86 vs 85
Dallas (NAS), TX	7,094,193	1,144,282	8,238,475	9,362,081	−13.6
Meridian (NAS), MS	4,997,097	2,029,809	7,026,906	7,273,336	−3.5
Millington (Memphis NAS), TN	21,188,759	8,166,664	29,355,423	32,249,275	−9.9
New Orleans (NSA), LA	8,679,365	2,290,813	10,970,178	12,116,834	−10.5
Staten Island (NUS), NY	210,079	0	210,079	216,829	−3.2

Totals

	FY 86 $ Sales Retail	FY 86 $ Sales Services & Other	FY 86 $ Sales Total	Total $ Sales FY 85	Total Sales % Change 86 vs 85
CONUS Totals	$762,915,562	$261,352,547	$1,024,298,109	$1,078,082,528	−6.1%

NAVRESSO Exchange Sales—FY86
Overseas

Alaska

Store	FY 86 $ Sales Retail	FY 86 $ Sales Services & Other	FY 86 $ Sales Total	Total $ Sales FY 85	Total Sales % Change 86 vs 85
Adak (NS)^m	9,185,588	2,387,276	11,572,864	11,279,611	2.5

Notes: ^{m}Main Exchange; ^{b}Branch Exchange

Australia

Store	FY 86 $ Sales Retail	FY 86 $ Sales Services & Other	FY 86 $ Sales Total	Total $ Sales FY 85	Total Sales % Change 86 vs 85
Exmouth (NCS)^m	1,068,616	266,902	1,335,518	1,871,911	−40.2

Notes: ^{m}Main Exchange; ^{b}Branch Exchange

Bermuda

Store	FY 86 $ Sales Retail	FY 86 $ Sales Services & Other	FY 86 $ Sales Total	Total $ Sales FY 85	Total Sales % Change 86 vs 85
Bermuda (NAS)^m	7,051,400	1,134,090	8,185,490	10,162,648	−24.2

Notes: ^{m}Main Exchange; ^{b}Branch Exchange

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NAVRESSO Exchange Sales—FY86
Overseas

Crete

Store	FY 86 $ Sales Retail	FY 86 $ Sales Services & Other	FY 86 $ Sales Total	Total $ Sales FY 85	Total Sales % Change 86 vs 85
Souda Bay (NAS)[b]	456,117	60,521	516,638	527,116	−2.0

Notes: [m]Main Exchange; [b]Branch Exchange

Cuba

Store	FY 86 $ Sales Retail	FY 86 $ Sales Services & Other	FY 86 $ Sales Total	Total $ Sales FY 85	Total Sales % Change 86 vs 85
Guantanamo Bay (NS)[m]	10,865,258	4,472,369	15,337,627	20,518,544	−33.8

Notes: [m]Main Exchange; [b]Branch Exchange

Hawaii

Store	FY 86 $ Sales Retail	FY 86 $ Sales Services & Other	FY 86 $ Sales Total	Total $ Sales FY 85	Total Sales % Change 86 vs 85
Barbers Point (NAS)[m]	16,605,835	5,249,993	21,855,828	22,263,920	−1.9
Honolulu (NCA)[b]	805,722	468,402	1,274,124	1,384,377	−8.7
Kekaha (PMRF)[b]	1,392,209	242,393	1,634,602	1,959,083	−19.9
Lualualei (NM)[b]	421,830	241,444	663,274	794,583	−19.8
Pearl Harbor (NB)[m]	76,159,483	12,572,408	88,731,891	86,938,912	2.0
Hawaii Totals	**$95,385,079**	**$18,774,640**	**$114,159,719**	**$113,340,875**	**−0.7%**

Notes: [m]Main Exchange; [b]Branch Exchange

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NAVRESSO Exchange Sales—FY86
Overseas

Iceland

Store	FY 86 $ Sales			Total $ Sales FY 85	Total Sales % Change 86 vs 85
	Retail	Services & Other	Total		
Keflavik (NS)[m]	12,406,385	4,040,080	16,446,465	19,184,069	−16.6

Notes: [m]Main Exchange; [b]Branch Exchange

Italy

Store	FY 86 $ Sales			Total $ Sales FY 85	Total Sales % Change 86 vs 85
	Retail	Services & Other	Total		
Gaeta (NSAD)[b]	541,578	309,259	850,837	1,203,043	−41.4
Naples (NSA)[m]	24,820,244	7,799,721	32,619,965	30,520,426	6.4
Sardina (NSO)/La Maddalena[b]	2,002,824	273,014	2,275,838	2,005,855	11.9
Sigonella (NAF)/Sicily[b]	13,647,300	4,569,125	18,216,425	16,054,393	11.9
Italy Totals	**$41,011,946**	**$12,951,119**	**$53,963,065**	**$49,783,717**	**7.7%**

Notes: [m]Main Exchange; [b]Branch Exchange

Japan

Store	FY 86 $ Sales			Total $ Sales FY 85	Total Sales % Change 86 vs 85
	Retail	Services & Other	Total		
Atsugi (NAF)[m]	10,038,144	2,558,982	12,597,126	11,180,066	11.2
Sanno Hotel (NEF)[b]	2,428,355	166,835	2,595,190	2,427,753	6.5
Sasebo (NOF)[b]	5,347,896	1,084,437	6,432,333	4,045,554	37.1
Yokosuka (FA)[m]	40,877,103	11,093,145	51,970,248	47,524,546	8.6
Japan Totals	**$58,691,498**	**$14,903,399**	**$73,594,897**	**$65,177,919**	**11.4%**

Notes: [m]Main Exchange; [b]Branch Exchange

Marianas Islands

Store	FY 86 $ Sales			Total $ Sales FY 85	Total Sales % Change 86 vs 85
	Retail	Services & Other	Total		
Guam (NS)[m]	37,194,167	8,288,801	45,482,968	60,464,772	−32.9

Notes: [m]Main Exchange; [b]Branch Exchange

Newfoundland

Store	FY 86 $ Sales			Total $ Sales FY 85	Total Sales % Change 86 vs 85
	Retail	Services & Other	Total		
Argentia (NF)[m]	988,295	292,492	1,280,787	1,526,055	−19.1

Notes: [m]Main Exchange; [b]Branch Exchange

New Zealand

Store	FY 86 $ Sales			Total $ Sales FY 85	Total Sales % Change 86 vs 85
	Retail	Services & Other	Total		
Christchurch (NSFAD)[m]	536,423	21,775	558,198	554,314	0.7

Notes: [m]Main Exchange; [b]Branch Exchange

NAVRESSO Exchange Sales—FY86
Overseas

Philippines

	FY 86 $ Sales			Total $ Sales FY 85	Total Sales % Change 86 vs 85
Store	**Retail**	**Services & Other**	**Total**		
Cubi Point (NAS)[b]	5,592,362	2,054,600	7,646,962	8,952,574	−17.1
San Miguel (NCS)[b]	2,069,667	617,738	2,687,405	2,751,990	−2.4
Subic Bay (NS)[m]	31,978,622	9,226,943	41,205,565	45,479,978	−10.4
Philippines Totals	**$39,640,651**	**$11,899,281**	**$51,539,932**	**$57,184,542**	**−11.0%**

Notes: [m]Main Exchange; [b]Branch Exchange

Portugal

	FY 86 $ Sales			Total $ Sales FY 85	Total Sales % Change 86 vs 85
Store	**Retail**	**Services & Other**	**Total**		
Lisbon (NSUH)[b]	715,482	0	715,482	653,071	8.7

Notes: [m]Main Exchange; [b]Branch Exchange

Puerto Rico

	FY 86 $ Sales			Total $ Sales FY 85	Total Sales % Change 86 vs 85
Store	**Retail**	**Services & Other**	**Total**		
Roosevelt Roads (NS)[m]	15,024,582	3,620,688	18,645,270	20,193,510	−8.3
Sabana Seca (NSGA)[b]	2,097,049	119,049	2,216,098	2,745,969	−23.9
Puerto Rico Totals	**$17,121,631**	**$3,739,737**	**$20,861,368**	**$22,939,479**	**−10.0%**

Notes: [m]Main Exchange; [b]Branch Exchange

Spain

	FY 86 $ Sales			Total $ Sales FY 85	Total Sales % Change 86 vs 85
Store	**Retail**	**Services & Other**	**Total**		
Rota[m]	20,544,538	5,457,538	26,002,174	24,584,960	5.5

Notes: [m]Main Exchange; [b]Branch Exchange

NAVRESSO Exchange Sales—FY86

Overseas

United Kingdom

	FY 86 $ Sales			Total $ Sales FY 85	Total Sales % Change 86 vs 85
Store	Retail	Services & Other	Total		
Brawdy (NF), Wales	786,026	228,206	1,014,232	925,730	8.7
Edzeli (NSGA), Scotland	2,023,244	570,394	2,593,638	2,421,178	6.6
Holy Loch (NSA), Scotland	3,073,564	477,284	3,550,848	3,291,905	7.3
London (NAUK), England	1,049,798	212,544	1,262,342	1,299,069	−2.9
Machrihanish (NAWF), Scotland	190,903	30,820	221,723	227,338	−2.5
St. Mawgan (NAWF), England	254,138	115,924	370,062	373,142	−0.8
Thurso (NCS), Scotland	481,287	58,964	540,251	502,690	7.0
West Ruislip (NA), England	2,170,722	391,242	2,561,964	2,108,562	17.7
United Kingdom Totals	**$10,029,682**	**$2,085,378**	**$12,115,060**	**$11,149,614**	**8.0%**

West Indies

	FY 86 $ Sales			Total $ Sales FY 85	Total Sales % Change 86 vs 85
Store	Retail	Services & Other	Total		
Antigua (NF)[b]	693,707	95,776	789,483	760,041	3.7

Notes: [m]Main Exchange; [b]Branch Exchange

Navy

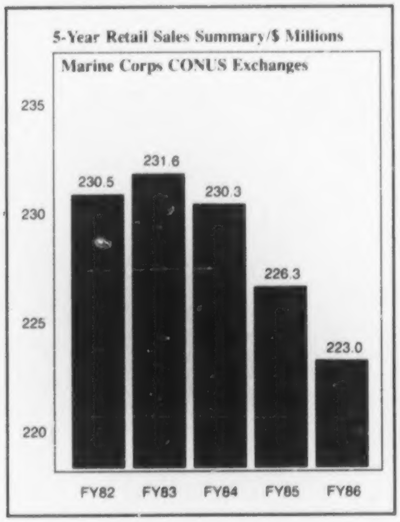
Totals

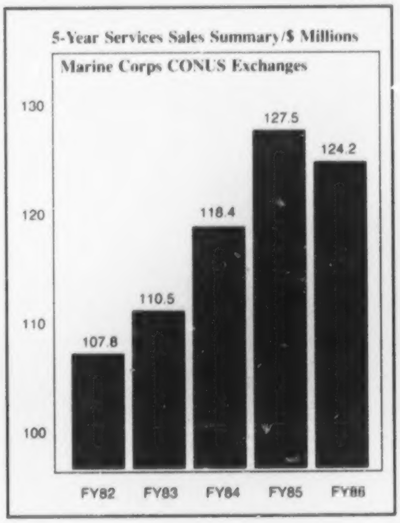
	FY 86 $ Sales			Total $ Sales FY 85	Total Sales % Change 86 vs 85
	Retail	Services & Other	Total		
Overseas Totals	**$363,586,561**	**$90,871,174**	**$454,457,735**	**$471,663,258**	**−3.8%**
Worldwide Totals	**$1,126,502,123**	**$352,253,721**	**$1,478,755,844**	**$1,549,745,786**	**−4.8%**

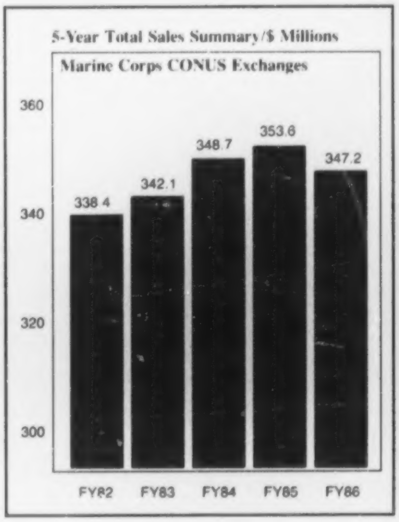
Marine Corps Exchange Sales—FY86

Continental U.S.

Store	FY 86 $ Sales Retail	FY 86 $ Sales Services & Other	FY 86 $ Sales Total	Total $ Sales FY 85	Total Sales % Change 86 vs 85
Albany, GA	3,544,017	1,041,478	4,585,495	4,375,941	4.6
Barstow, CA	1,346,172	1,245,006	2,591,178	2,579,763	0.4
Camp Elmore, VA	3,992,985	1,397,382	5,390,367	5,192,800	3.7
Camp LeJeune, NC	35,002,472	29,286,503	64,288,975	67,790,190	−5.4
Camp Pendleton, CA	38,177,938	28,605,337	66,783,275	68,131,413	−2.0
Cherry Point, NC	13,708,095	11,490,943	25,199,038	24,635,761	2.2
El Toro, CA	24,982,941	17,959,054	42,941,995	48,844,936	−13.7
Henderson Hall, VA	12,472,537	2,105,532	14,578,069	11,763,547	19.3
Parris Island, SC	17,764,148	7,023,781	24,787,929	23,710,280	4.3
Quantico, VA	30,134,792	5,600,476	35,735,268	34,304,732	4.0
San Diego, CA	23,644,535	6,204,638	29,849,173	31,049,955	−4.0
Twentynine Palms, CA	13,663,560	8,149,936	21,813,496	22,438,261	−2.9
Yuma, AZ	4,539,958	4,054,874	8,594,832	8,981,432	−4.5
CONUS Totals	**$222,974,150**	**$124,164,940**	**$347,139,090**	**$353,799,011**	**−1.9%**

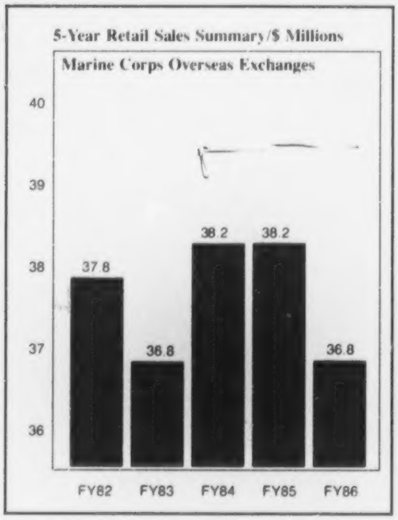


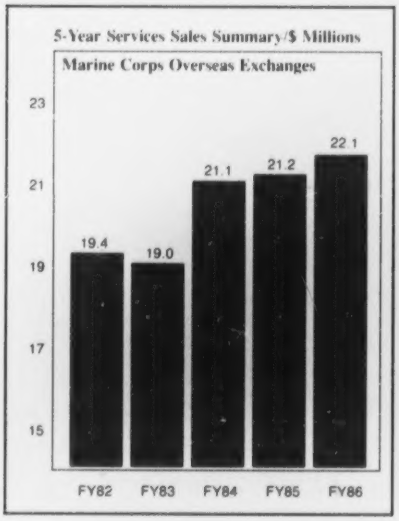


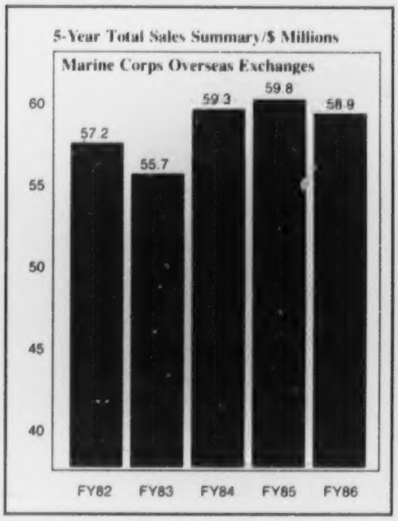


Overseas

Store	FY 86 $ Sales Retail	FY 86 $ Sales Services & Other	FY 86 $ Sales Total	Total $ Sales FY 85	Total Sales % Change 86 vs 85
Guantanamo Bay, CU	4,467,504	350,045	4,817,549	5,560,763	−15.4
Iwakuni, Japan	9,922,765	7,229,363	17,152,128	17,690,899	−3.1
Kaneohe Bay, HI	18,472,909	14,051,303	32,524,212	32,761,126	−0.7
Rodman (Canal Zone), Panama	3,987,923	457,700	4,445,623	3,781,764	14.9
Overseas Totals	**$36,851,101**	**$22,088,411**	**$58,939,512**	**$59,794,552**	**−1.5%**
Worldwide Totals	**$259,825,251**	**$146,253,351**	**$406,078,602**	**$413,593,563**	**-1.9%**


5-Year Retail Sales Summary/$ Millions


5-Year Services Sales Summary/$ Millions


5-Year Total Sales Summary/$ Millions

Dutch Masters®
Dutch Treats®
EL Producto®
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H. UPMANN 1844®
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Mixture No. 79™

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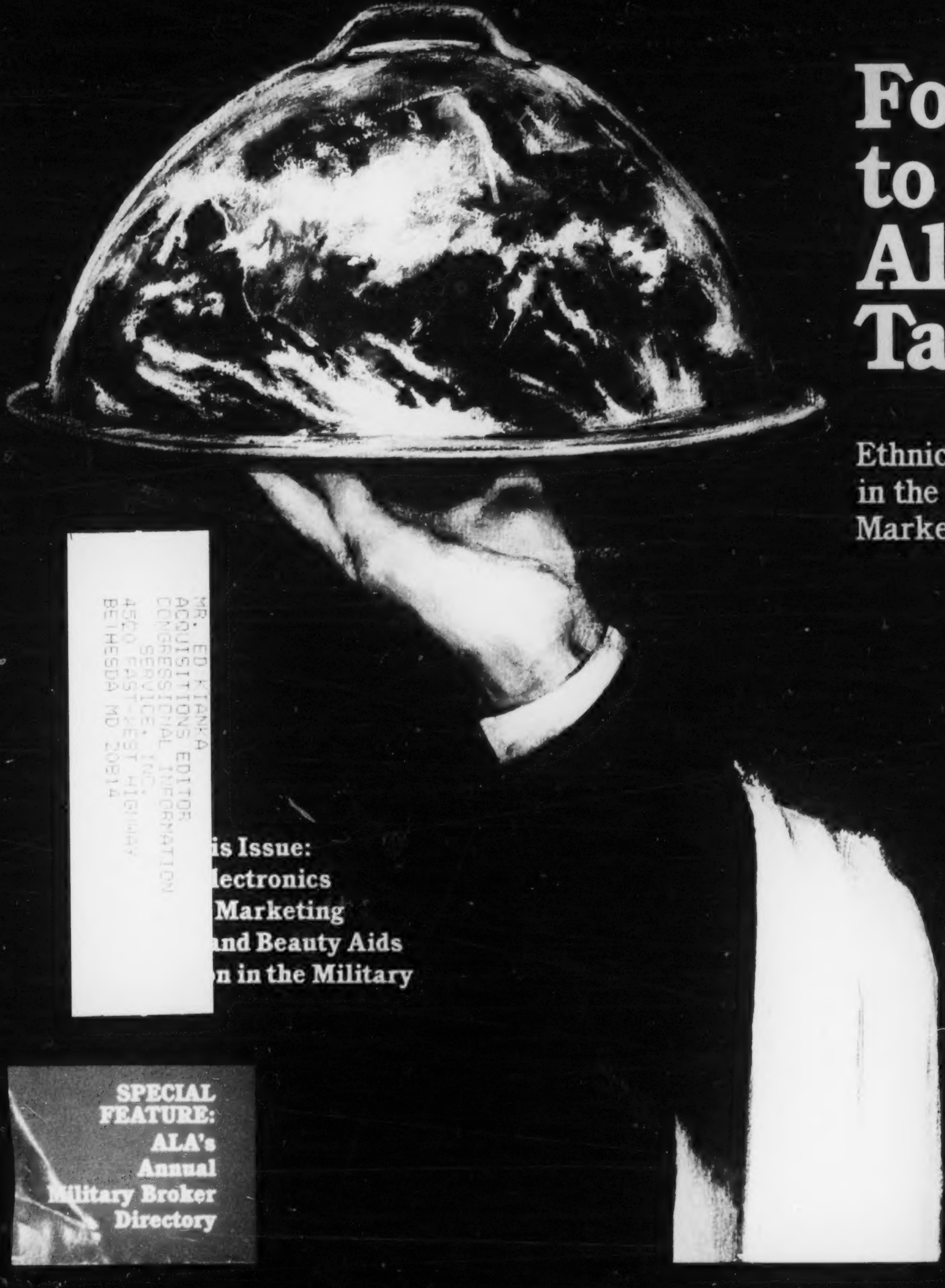
FALL 1987



Foods to Suit All Tastes

Ethnic Foods in the Military Marketplace

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Marketing
and Beauty Aids
n in the Military

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Foods To Suit All Tastes

BY KATHY BOYLE

FROZEN PIZZA CATEGORY

Continental U.S. Commissaries Only
Shares based on pounds
Period Ending June 1987

Total Market = $24 million annually
(12.2 million pounds)

Manufacturer/Brand	Current 12 mos. % Share of Market
Pillsbury	35.51%
■ Totino	13.70
■ Jeno's	12.53
■ Pillsbury	7.91
■ Chef Saluto	1.37
Schwan's Sales Enterprises	22.56
■ Tony's	11.58
■ Red Baron	10.98
Quaker Oats Co./Celeste	18.42
Stouffer Frozen Foods, Inc.	8.31
Tombstone	6.12
"All Other" Brands	9.08

Source: Military Audits of Markets Information, Inc.

Ten years ago when the average American thought of Italian food, the immediate response was either pizza or spaghetti. Today, in the American consumer's continued search "for something new," Italian food may bring images of white clam sauce, fettucine, or frozen Italian entrees. The same is true for other ethnic departments. There are new Mexican salsas (Spanish for "sauce"), Hispanic spices, Oriental shrimp chips, and regional American foods such as crawfish and Creole mustards, many of which people never heard of ten years ago. Most all are readily available at the commissary.

In the military, with a population more mobile than the civilian sector, and long accustomed to sampling foods throughout the world, ethnic foods have always been strong sellers. Today many manufacturers note, however, military sales which usually run two to three percent for most products, in many ethnic categories are easily doing five to six percent of a product's total sales.

Kathy Boyle is a Washington, D.C.-based freelance writer. She writes widely on retail grocery and food service subjects, and writes for several well-known national trade organizations.

Changing Tastes

Why the continued strong interest in ethnic cuisine?

In general, people today are more willing to experiment with foods. Also, ethnic restaurants have grown in popularity—making people more aware of unusual ethnic foods.

In addition, magazines and food editors are publishing recipes for more ethnic dishes, making it easier for consumers to try new items in their own kitchens. Trying these items at home, at less cost than at a restaurant, is very appealing to many consumers.

In addition, ethnic food may get a little extra push in the supermarket—giving it the exposure it needs to take hold—because of its potential profitability. Many of today's ethnic foods are high ticket, convenience items. A prepackaged complete meal or a ready-to-eat appetizer, for example, are items for which consumers are willing to pay a little more. In commissaries, where consumers are offered a substantial price benefit, these items are particularly hot sellers.

Overall, the $1.4 billion category ethnic entrees market are divided as follows:
- Italian 56%
- Mexican 18%
- Oriental 22%
- Other 4%

In the frozen entrees and dinners category alone, according to Selling Areas Marketing Inc. (SAMI) from 1983 to 1987 the frozen entrees and dinners category grew by 31 percent. Italian entrees showed the greatest overall growth—47.1 percent.

In the military market, where microwave ownership is extremely high, new microwaveable entrees are making strong inroads. On most military installations, note manufacturers, there is a microwave on every floor of every barracks.

Spanish/Mexican Foods

Spanish/Mexican foods still are tops in terms of dollar volume and share of the meat and specialty foods category (not including frozens) in the supermarket, according to figures by *Progressive Grocer* magazine. They represent almost 29 percent—$354.99 million—of the meat and specialty food categories total sales.

According to Richard M. Macheske,

French Bread

Although they have been marketing to military commissaries since 1973 (the company was founded in 1972), Vie de France has enjoyed enormous growth in military exchanges over the past few years. "For the past two and a half years we have been in exchanges as in-store bakeries," explains Laurie Baskin, assistant marketing manager, military accounts. "We are usually located in the food cluster in the shopping mall area with 200 to 400 square feet." As well as the French breads, baguettes, sour dough, multi-grain and rye breads, and croissants (almond, chocolate and butter) sold in the commissaries, the exchange locations carry 12 types of cookies, muffins in eight flavors, and award-winning fruit tarts available in apple, apricot, peach and pear and made with an all butter french pastry crust. Currently Vie de France has 37 AAFES bakeries. "The Vie de France bakery products are baked at the bakery from frozen dough block," says Baskin. "At the commissary, however, the product is delivered fresh from our wholesale bakeries." Located in the bread, gourmet or deli section of stores, Vie de France is happy with its commissary locations, but this past year introduced attractive new display racks to highlight its products. ■

ORIENTAL FOOD MARKET (Dry & Frozen)

Continental U.S. Commissaries Only
Brand Share by Dollars
Year Ending, 1986

Total Market = $20,278,000

Brand	Yearly $ Volume	% Market Share
Chun King	$3,166,960	15.62%
Kikkoman	2,844,000	14.03
La Choy	2,063,142	12.11
Lean Cuisine (Oriental)	2,107,000	10.39
Benihana	1,866,063	9.20
Le Menu Oriental Dinners	1,687,000	8.32
Dinner Classics & Classic Lites (Oriental)	1,608,488	7.93
Tyson Dinners	514,190	2.54
	Total	**80.14%**

Source: Military Audits of Markets Information, Inc.

director of military sales for Pet Incorporated who own Old El Paso, a complete line of Mexican foods, "Mexican is the fastest growing segment of ethnic foods. As measured by SAMI figures, Mexican grew 7 percent in volume, and 9.5 percent in sales dollars."

"We find that people are trading up – they are buying the new prepared dinners," notes Macheske, "like the enchilada dinner, as a convenience, where they only add the meat and trimmings."

The fastest growing items for Old El Paso according to Macheske are the salsas. "Our most successful new products are our thickened salsas," says Macheske. "They have so many applications and multiple uses."

Today, there is more than just one kind of taco shell. Notes Macheske, "Now we have mini taco shells, and tostacos – a corn taco tray." And adding to its snack food Nachips, Old El Paso now produces Nachos Pronto, a convenience snack item with cheese which is heated in the microwave. "Even in refried beans," adds Macheske, "we see activity. Consumers can now buy refried beans with sausage, bacon or green chiles."

On September 15th each year Old El Paso commemorates Hispanic heritage for military personnel. Describing the commemorative activities, Macheske notes, "This year we have $50,000 in savings bonds as prizes. We will select ten eligible winners from each commissary and 400 will be brought in for the selection of the final 175 winners. In addition, Old El Paso is offering display materials and piñatas to complement the promotion."

Enhancing its grocery department line of Old El Paso, the company has aggressively added frozen Old El Paso products. Says Richard A. Barrick, military sales manager of Pet's frozen food division, "Old El Paso frozen entrees, burritos and dinners are the number one frozen Mexican in the country." They can be used in the conventional oven or they are microwaveable.

Ortega, a 60-year-old manufacturer of authentic Mexican food, recently changed hands to Nabisco in July 1986. Ortega is the second largest Mexican food line in the country. However, Steve Braitman, product manager at Nabisco explains, "We (Ortega) are fairly new to the commissary, but the military is an important market for us, and we are developing promotions and a special focus through education. We see a lot of opportunity for growth in this section and have already expanded the section with two new products and two salsas."

Fifty-year-old GOYA Foods, the largest family-owned Hispanic business in the U.S., is another dominating force in this segment. According to Trisha Reinus, national public relations consultant for GOYA, they carry a line of 800 items, among them 28 varieties of beans, four types of rice, tropical nectars, and a 30-product line of frozen foods. They had company sales of $250 million in 1986.

Although the GOYA frozen food line is only two years old, it is the fastest growing segment of the GOYA business. Frozen, all natural fruit mixers, frozen paella, frozen au gratin seafood in shells, and frozen churros (stick fritters used for dunking), and frozen vegetables such as yuca (like a potato but a little more fibrous) are some of the 30 items now in the frozen line.

GOYA is one company to heavily capitalize on recipes and cookbooks to promote their products. These inexpensive books, running approximately $1.00 for postage and handling, are available for customers who write to GOYA. Some of the cookbook topics are: "Latin Barbeque a la GOYA," "The GOYA Bean Book," "Cooking with Coco GOYA," "GOYA Introduces Tapas," and, "The GOYA Caribbean Cook's Book" (a collection of recipes from restauranteurs in New York, Miami and Puerto Rico). "In fact," says Reinus, "when researching the Caribbean recipes cookbook, GOYA chose the Officers Club in San Juan, Puerto Rico, for the best recipe for chicarronas, fried tidbits." For commissaries, rack cards are directly available through sales reps.

In the past, GOYA has targeted the Hispanic market, but in the last five years it has aggressively begun to target the mass market. "It was not until the late 60s that grocery stores readily accepted GOYA products," explains Reinus. "I think the mass market really got their introduction to GOYA through the Coco GOYA and GOYA pineapple juice, used in making Piña Coladas. They went to the islands, came back, and decided to make their own Piña Colada. From there we have been mainstreaming our beans, rice and other nectars.

"I think what the people who sample our

DRY MEXICAN & ORIENTAL FOOD

Continental U.S. Commissaries Only
"Top 25" Best-Selling Items
Quarter Ending December 1986

Rank	**Item**	**% Share of Market**
1	McCormick/Schilling Mex. Seasoning Mix	11.24
2	Old El Paso Refried Beans 16z.	5.81
3	Pace Picante Table Sauce 16z.	4.88
4	Rosarita Refried Beans 16z.	3.47
5	Old El Paso Taco Sauce 8z.	2.71
6	Old El Paso Green Peppers 4z.	2.70
7	La Choy Bi-Pak Dinner 42z.	2.62
8	Durkee Mexican Seasoning Mix	2.31
9	Old El Paso Taco Shells (12 ct.)	2.30
10	Old El Paso Taco Sauce 16z.	2.12
11	Old El Paso Enchilada Sauce 10z.	2.07
12	La Choy Chow Mein Noodles 5z.	2.04
13	Kikkoman Soy Sauce 20z.	2.03
14	Old El Paso Green Whole Peppers 4z.	1.94
15	Old El Paso Mexican Seasoning Mix	1.84
16	Old El Paso Salsa 16z.	1.76
17	Van Camp Chili Beans 15z.	1.63
18	Kikkoman Soy Sauce 10z.	1.59
19	Old El Paso Taco Kit (12 ct)	1.57
20	Chun King Chow Mein Noodles 5z.	1.57
21	Chun King Divider Pak Dinner 42z.	1.47
22	Rosarita Refried Beans 30z.	1.44
23	Old El Paso Taco Shells 18 ct.	1.43
24	Dynasty Water Chesnuts 8z.	1.37
25	Lawry's Mexican Seasoning Mix	1.35

Source: Military Audits of Markets Information, Inc.

products find is the convenience factor—so many of them are quick and easy to prepare. In fact, we have even conducted media tours to demonstrate preparation." For example, Reinus explains that Recaito, a puree of green peppers, garlic and onions, is a flavoring base for many Spanish stews and soups. So that cooks do not have to spend hours in the kitchen making the puree, GOYA offers this as a frozen or jarred convenience item.

GOYA's TV ads have complemented this educational effort for non-Hispanics. "Our TV ads show the many different uses for GOYA beans, not only to get across the GOYA name, but to educate about our products as well," explains Reinus.

Typically GOYA products were located in their own separate sections so Hispanics could easily find the products. Despite their current mass marketing approach, GOYA still prefers this separate sectioning approach in the commissary.

"Much of our movement in the military is due to the high Hispanic population in the military," notes John Raimondi, military sales manager at GOYA, "with people wanting to choose from brand names they are accustomed to. But, today more and more non-Hispanic people in the services have started trying GOYA products, like the extra virgin olive oil, the beans and the rice. These were non-frightening items they could start with. GOYA products made it easier for them to recreate the specialties they may have tried in other parts of the world."

Oriental Foods

Although commissaries always carried a limited line of Oriental products, today almost all commissaries worldwide have a separate Oriental section. Explaining changes in the market, Harold S. Stein, president of Harold Stein & Associates, Sausalito, CA distributors, says, "Three things have happened in the military Oriental market: we have sales from the normal Oriental population; a large number of military are stationed in the Pacific, get back home and want certain unusual items; and, we get a tremendous amount of publicity from newspapers and magazines—food editors and gourmet food magazines, with articles and recipes for Oriental items."

The past six years have meant dramatic growth for Stein in Oriental foods. "Today most commissary stores are stocked with Oriental items. It is rare, even in Europe to see a store without an Oriental section. And, our new items—things like rice crackers, donut cookies and shrimp chips (a shrimp flavored stick) have really gone up in sales." Since 1982, Stein has seen an 82 percent sales jump in his Oriental food category. As Stein admits, growth won't continue at that rate since most commissary stores have now added an Oriental foods section, but he adds, "We still predict a 14 percent sales increase this year."

Further growth will probably come in creating more extensive Oriental sections with more variety of items. For example, Stein points out that more unusual items are being added: "The Japanese have now perfected Tofu in a carton with a shelf life of about one year." There is also a new stir fry developed by S & B Oriental seasonings, and teriyaki and fried rice entrees, geared to American tastes. And, the Japanese are experimenting with frozen items which means the microwaveable Japanese meal will be available in the future. Stein notes most of his sales are in the more familiar Japanese, Korean and Thai items, but in the Navy especially, he does an exceptionally good Filippino foods business.

Stein's company offers giveaway Oriental recipe cards and folders for the asking through military sales reps. At Chinese

New Year they do special promotions and follow-up about six months later with another. In addition, Stein's company uses in-store demonstrators by request for some snack items.

Not complacent, Nabisco's Chun King division is introducing new products. "With Chun King," says Braitman of Nabisco, "we have a very big and very thriving presence." Still, Braitman notes that Chun King is not relaxing and is, "introducing new products, for example, sweet and sour complete meals with either pork or chicken." He claims that Chun King is the only ones on the market providing such a product.

Italian Market Diversifies

Today traditional Italian spaghetti sauce and familiar canned Italian entrees are being joined on the shelves by many varieties of thicker, heartier and zestier sauces along with pasta toppings, pasta meals, and imported pastas. Additionally, the familiar frozen pizza is being joined by microwaveable and pan varieties.

Non-tomato-based spaghetti products such as Alfredo and pesto are making inroads. Despite the recent proliferation of types of sauces – now over 60 varieties at the warehouse, according to the most recent 1987 figures from *Progressive Grocer* magazine – the $600 million spaghetti sauce market grew only 5.13 percent from 1985 to 1986.

Some companies are adding to their familiar lines some more adult-oriented products. Campbell, for example, just rolled out Franco-American Hearty, a three-item line consisting of beef ravioli, macaroni with beef, and twists in pizza sauce. The products are targeted for adults and teenagers, as a companion to the company's successful Spaghetti Os geared to younger children.

Similarly, New York-based American Home Products is complementing its Chef Boy-ar-dee line (the number one or number two canned pasta in most markets), with its Mamma Leone glass-jarred pastas. American Home Products recently added Mamma Leone's Pasta Suprema, a firmer pasta in a more robust sauce. "With Mamma Leone we were very pleased to use the name of Mamma Leone, associated with high quality," says Ann Jane Tanner, consumer affairs advisor at American Home Foods. "It is a unique item with a new cooking process done generally in the manner you cook at home, with the pasta and sauce cooked separately, then mixed together, then vacuum sealed with no additives."

Other companies are expanding into frozens. Pet, for example, who purchased Progresso in November 1986 is now testing a Progresso line of frozen Italian foods. "We are the only manufacturer offering three veal items," says Barrick, "and it is all milk fed veal, cut in strips rather than in chunks. We have a total of 12 different frozen Progresso Italian entrees, displayed in the same blue and red colored design as the canned items varying in weight from 11 to 14 ounces. The entire State of Washington is a test market for all the military services. These entrees are a complete meal for one person, or a side dish for two and can also be prepared by boil-in-the-bag rather than the microwave. Besides the three veal dishes, there are three chicken, three ham and beef, and three straight pasta entrees.

Since Pet bought the line it is the first time it is being advertised to the military. "Once a month we offer in-store coupons since we feel the military is really interested in these in-store coupons," notes Macheske.

The frozen pizza section is changing as new microwaveable pizzas appear. "Between our three companies – Totinos, Pillsbury Microwave and Jenos – we have a 55.2 percent share of the pizza market," says Steve Carvel, product sales manager for Pillsbury. "We are now introducing Totino's Party pizza, called Temptin' Toppings. It is a higher quality pizza with more weight, real pieces of meat, and will be supported by $12 million in advertising support."

Carvel notes that a companion product,

MEXICAN FOOD MARKET (Dry & Frozen)

Continental U.S. Commissaries Only
Brand Share by Dollars
Year Ending, 1986

Total Market = $23,290,000

Brand	Yearly $ Volume	% Market Share
Old El Paso	$6,775,709	29.09%
Patio	2,150,000	9.23
Little Juan	2,031,000	8.72
Pace	1,721,000	7.39
Rosarita	1,313,896	5.64
Cafe Mexico	794,638	3.41
Ortega	601,713	2.58
Van de Kamp's	581,713	2.50
Tio Sancho	561,225	2.41
Banquet	398,468	1.71
Lawry's	398,294	1.71
Jimi	381,790	1.64
Rosita	349,247	1.50
	Total	**77.53%**

Source: Military Audits of Markets Information, Inc.

Totino's microwave family-size pizza, will be introduced this coming October. "We are leaders in this business, being the first with microwave pizza. In the military where companies usually do two to three percent of their business, we are doing six percent." The reason says Carvel: "Microwave ownership in the barrracks is so high."

Also, In October Pillsbury intends to roll out in the Southwest and Central states a super high quality Totino's pan pizza in a domed plastic container, says Carvel. "We knew that pan pizza was preferred by 48 percent of restaurant pizza eaters." The pizza will sell for $3.95 to the military customer and come in four varieties with meats covered by three different types of real cheese. "It has one pound in toppings," says Carvel. "We saw a need for it. Pan pizza is the number one selling variety at Pizza Hut, and there was no product like it in the frozen world."

Imported dry pastas are also making inroads. "We realized the military was a hidden market for us," says Michael Esposito, president of DeLaurentiis imported pasta. Esposito has now bought out Dino DiLaurentiis, the movie mogul (whose father was actually a pasta manufacturer). The DiLaurentiis pasta is a high quality, imported dry pasta made in Monte Contini, Italy, known for its waters. "By offering the military a very high quality product at a great savings – 20 percent," says Esposito, "we are getting very good repeat business. The military business is coming on by leaps and bounds – we are now in 26 commissaries. The military customer is a loyal group. If they get something they like, they are loyal to that manufacturer.

"We want our entire line of Italian ethnic foods to stay on the pasta aisle," says Esposito who has recently begun to add complementing products to his pasta line – tomatoes from Naples and a grated parmesan cheese in a shaker. The tomatoes and cheese have packaging continuity and are marketed under the same DeLaurentiis name as well.

Cajun Specialties

A recent obsession for New Orleans Cajun products is developing a whole new ethnic department in supermarkets as well as commissaries. Kraft's Makin' Cajun line, consisting of Creole, spiced brown and spiced fruit varieties, Borden's Cajun Hot Sauce Topping, Pet's acquisition of Cajun Foods, and McCormick's acquisition of Brennan's spice and food line are all big players in the growing Cajun market.

"It is an interesting development for us," notes Mac Barrett, press relations manager for McCormick & Co., Inc., Hunt Valley, MD. "With ethnic opportunities growing, we are looking for new possibilities." Through purchase of Classic American Foods in March 1986, McCormick picked up not only a line of five winery mustards and a growing regional American gourmet and specialty foods business, but they also obtained the Brennan's Restaurant of New Orleans line of six shake-on seasonings, one creole mustard, two sauces, and one butter pecan dessert topping. Since acquisition, McCormick has expanded the line to 19 items. "We are in a test situation now," explains Steve Hughes, manager of McCormick's Brennan's line. "But we think we have a total category opportunity. We may end up dropping or adding a few items, but we see a great opportunity for a complete product line."

"We rolled out the military first, in March 1987," says Hughes, "and so far, we are doing extremely well with the numbers in the commissaries." McCormick's ultimate goal is to have their own Creole section. "Ideally, we would like a New Orleans department," says Hughes. But for now, they are happy to be located next to the Mexican Foods section. Hughes added, "We will be running a promotion in the fall which includes a prize trip to New Orleans."

Pricing is perhaps the key to Cajun success, according to Hughes. "With the military's lower price for an item – say $1.12 versus $1.89 in the supermarket – it is easier to get the first trial," he notes. "At Fort Meade, MD, for example, they are already moving 120 cases a month."

To educate consumers about using the Brennan's products, McCormick includes a recipe leaflet in all the cartoned products – crispy chicken, jambalaya, shrimp creole, Mardi Gras dip, and creole rice – which explains how to use the rest of the line.

Pet is also taking an aggressive approach to Cajun Foods. "We bought a Louisiana company, Cajun Food's frozen line," says Barrick. "Cajun Food's are complete dinners, either microwaveable or boil-in-bag, and include a packet of Louisiana rice and a topping." There is crawfish bisque with rice, crawfish etouffe with rice, shrimp etouffe with rice, shrimp creole with rice, shrimp gumbo with rice, shrimp jambalaya with rice, and a stuffed crab.

Future Bright for Market

Competitive pricing, national brand image, and ethnic diversity within the military all mean continued strong acceptance of ethnic foods in commissaries. Additionally, convenience foods, such as the microwaveable dinners and more expensive appetizer items (sold for less in the commissary) should continue to be strong military sellers. ■

Passage From India

Chutney's, pickles, spice pastes, curry sauces and pappadums (crackers) from India are starting to appear on commissary shelves. Patak's, a line of authentic Indian foods, headed by Yogesh and Rajoo Patak, has joined forces with French's Specialty Food Division to bring these Indian specialties to the U.S. "We felt the time was right to introduce Indian cuisine to the U.S.," says Yogesh, "and the early signs indicate we were correct. Distributors, retailers and consumers have been very receptive to Patak."

The line of Patak products are made from Indian spices, fruits and vegetables which are processed at manufacturing facilities in the U.K. Patak is the largest supplier to Indian restaurants in England and Europe.

Yogesh's wife Shobna and sister-in-law Jay have traveled throughout the United States demonstrating the products. According to Shobna, the response has been overwhelming: "Wherever we go, people love the tantalizing aromas and flavors and we often completely sell out of the varieties being demonstrated."

Patak believes that with more Indians coming to live in the U.S. (over one million currently living here) there will be a growing Indian foods market. Additionally, although still small, the number of Indian restaurants are beginning to grow. In 1984, according to figures provided by the International Institute of Foods and Family Living of Chicago, there were 181 known Indian restaurants in the U.S. In 1986, there were 261. This year the number is expected to exceed 500.

Committed to educating the American consumer on Indian cuisine, Patak provides recipes and quarterly newsletters with information on Indian food and culture. Also Patak has a toll-free number the consumer can call for information. ■

Poultry: Low Fat Way to High Sales

BY MARIE KRAKOW

Since Herbert Hoover first campaigned with his "A Chicken In Every Pot" slogan, the American poultry industry has done a lot better than most politicians.

Per-capita consumption of poultry in the U.S. has risen more than 500 percent since Hoover's day, as poultry-raising became the most industrialized type of animal production in the world.

Today's factory-like computerized feeding, watering and assembly-line style processing have so sharply reduced the cost per pound of poultry that what was once a luxury form of protein has become a staple.

Aggressive marketing techniques by high-visibility companies (like Perdue Farms for chicken and Swift-Eckrich for turkeys) have also raised poultry consumption by creating brand name recognition and awareness.

Finally, beliefs about which foods are healthier have had a positive influence on poultry consumption, as more consumers shift away from red meat in an effort to control the amount of fat in their diet.

"Most industry analysts at the beginning of 1987 felt that poultry consumption would overtake beef on a per-capita consumption basis," said Flo Dunn, of the U.S. Army Troop Support Agency.

What all this means for commissaries, as well as civilian supermarkets, is that poultry is a genuine growth category with potential for increasing sales.

Choosing Suppliers

The Defense Personnel Support Center (DPSC) currently provides military com-

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missaries with a supply bulletin listing approved poultry producers.

Roy Seneca, a spokesman for the DPSC, said the five biggest poultry suppliers on the supply bulletin for CONUS commissaries are: Tastybird (Tyson Foods); Holly Farms; Country Pride (ConAgra); Rockingham Poultry; and Perdue Farms.

CONUS commissaries can choose from among the poultry companies on the list, or can choose other regional or local suppliers, usually on a bid basis.

Army commissaries select poultry producers via blanket purchase agreements, supply bulletin blanket delivery orders, and by competitive blanket purchase agreements, according to the TSA.

The Air Force said its leading poultry brands include Country Pride, Gold Kist, Holly Farms, Hudson, Wayne, Perdue, Foster Farms, Tyson, and Pilgrim's Pride. The Navy listed Foster Farms, Zackey, Rockingham, and Country Pride.

(Commissaries located overseas buy only frozen poultry, and the selection is said to be made by a special buying panel.)

The usual practice is for fresh chicken suppliers to bid for commissary shelf space on a price basis. Perdue is the only company that doesn't bid, yet still gets into military commissaries, according to the DPSC (and some competitors).

Perdue counts on the high brand name awareness it has created among consumers and on its premium quality and never attempts to compete on a price basis.

It is stocked in more than 45 CONUS commissaries on this basis, although it is higher priced than other chicken brands, one company source said.

Perdue joined the ALA and created the position of military sales manager for the first time this summer, according to Chris Barnes, who fills the job. He said Perdue is currently trying to increase its military business, particularly in the Northeast and Southeast.

If it succeeds, it will be making inroads on the territory of Holly Farms, the other premium chicken brand frequently mentioned by commissaries.

Commissary shoppers prefer buying frozen poultry parts.

A Holly Farms Poultry distributor said that although the company sells in excess of 150,000 pounds of chicken a week to commissaries, mostly in the Southeast, the military market comprises only a small portion of Holly Farms' total retail sales.

Industry Increases

According to the National Broiler Council, Washington D.C., the per capita consumption of chicken in 1986 was 72.5 pounds, up from 70.1 pounds in 1985.

Spokesman Bill Roenigk said he expects the figures for 1988 to go up to 78.7 pounds, an 8.6 percent increase, based on the size of breeding flocks and on discussions with producers about profitability.

At the National Turkey Federation, Reston, VA, spokesman David Goldenberg said per capita turkey consumption was about 13½ pounds for 1986, expected to rise to 15½ pounds this year, an increase just over 14 percent.

Of the Army, Navy, and Air Force commissaries, only the Air Force said it expects poultry increases in line with those industry predictions. AFCOMS meat specialist Mike Domitrovich projects an 8–10 percent increase over AFCOM's 1986 $28.8 million poultry sales for Continental U.S. commissaries.

It's a more paltry poultry outlook from the Army and Navy. Based on the poultry sold in March 87 compared to March 86, Army commissaries had a 4.5 percent increase, according to TSA. Navy commissary poultry sales are running only 2 percent above 1986 and are expected to continue at the same rate through fiscal 1987, said Maureen Murray of the Navy Resale and Services Support Office (NAVRESSO).

Merchandising Is Key

Some military market sources maintain that poultry business in the commissaries is doing much, much better than those figures reflect, especially in those stores where attention is paid to merchandising the meat case.

Commissaries that do a poor merchandising job may be dragging down total sales figures, they suggest.

"Frequently commissaries are trying to market an item of the 80s with the equipment of the 60s, with all the limitations the military puts on them," one producer explained. "What we're seeing in commissaries is very little merchandising knowledge in the meat cases, although it does exist in other sections," another complained. "In a civilian supermarket, the meat manager is paid a bonus based on the number of pounds sold and the profits made, so it's to his advantage to make the section exciting. There's no real incentive to move product in the commissaries," he said.

But when a commissary does handle its poultry merchandising properly, the results can be startling, as the Army commissary at Fort Bragg, NC found out.

In April, the store switched from major

NEW POULTRY PRODUCTS BEING INTRODUCED TO THE MILITARY

"It's harder to get a new poultry product into commissaries than into civilian stores. First you've got to get it listed on the supply bulletin of the Defense Personnel Support Center. Next you've got to go to each regional headquarters. Then you've got to go to each individual commissary to sell it," one industry source representing specialty and "further processed" products.

It's a lot of trouble, but it must be worth it. Below are just a few of the new products that poultry producers said they were introducing to the military market this summer:

Company	**Product Description**
ConAgra	Banquet brand Garlic and Herb Fried Chicken (frozen entree)
Rockingham Poultry	Valley Colonel brand 100% Chicken Hot Dogs with one third less sodium
Swift-Eckrich	Butterball brand Turkey Franks
Tyson Foods	"Chicken Originals" boneless, skinless breasts marinated in eight flavors and packed raw in a poly pouch to be microwaved in 3 to 5 minutes

producer Holly Farms to Rockingham Poultry Marketing Co-Op and began a series of merchandising steps that resulted in a 51.3 percent tonnage increase in fresh poultry for May 87 compared to May 86.

Fort Bragg Experience

"The poultry market, especially fresh chicken, has exploded for us and is expanding by leaps and bounds," said Ft. Bragg commissary officer James Perleth. "For the month of June, we had an additional 32.2 percent increase."

Perleth credits much of the success to new meat manager Al Hatfield, who standardized displays, expanded product lines where customer demands warranted it, and cut back where there was an oversupply.

"We're probably carrying fewer items than before, but we're carrying what will sell," he said.

Hatfield, who said merchandising to customer needs was his main concern, increased his store's inventory of family packs for thighs and drumsticks and added packs of quarter legs and breasts.

He said the most popular poultry items are probably the three and a half pound "Pick of the Chick" packages with breasts, drumsticks and thighs.

Rockingham sales rep Keith Buse said Fort Bragg has nearly doubled the space it devoted to fresh chicken and customer response is keeping sales strong.

Boneless jumbo packs of fresh chicken parts – a new item – are doing very well, especially on the first and 15th of each month, Army paydays.

Perleth said, a little sadly, that Hatfield did his job so well he's being promoted right out of the store.

Packaging Variations

Army, Navy, and Air Force commissaries all said whole chickens are their best-selling poultry items.

But today's military shoppers have dozens of other packaging variations of poultry to pick from, too, including: boneless birds; combo packs of choice parts; tray packs of special parts like boneless, skinless breasts; "further processed" poultry products like nuggets, patties, strips and chunks; processed luncheon meats and hot dogs made of turkey or chicken; and frozen poultry entrees.

One of the most popular items sold in military commissaries isn't even available in most civilian supermarkets – individually quick frozen (IQF) chicken parts packed in a heavy poly bag.

This product, from Tyson Foods Inc., the world's largest producer of broilers and supplier of poultry products to military commissaries, lets consumers take as many pieces from the bag as needed, because they don't stick together like other frozen poultry parts.

"You won't find these IQF pieces in the poly bag in civilian supermarkets because chickens sold in meat markets as so-called fresh items are priced as a loss leader to bring people into the stores," said Edmond Jared, Tyson director of military sales.

Why Frozen Does Better

Jared explained that although many civilian stores "football" the price of fresh poultry (artificially depress it), they add the usual 28 to 32 percent profit margin to frozen poultry, so it doesn't sell as well.

But in the commissaries, where loss leaders and added profit margins aren't used, there isn't as great a differential between fresh and frozen poultry prices.

"That's one of the reasons why our IQF products are accepted in the military market," Jared said.

Frozen poultry is also more popular in commissaries than in civilian stores because military consumers tend to do more once-

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a-month shopping and buy in larger quantities.

A military sales manager from one of the leading premium fresh chicken producers agreed glumly that commissary shoppers seem to prefer buying frozen parts, even when his company's fresh parts cost less.

"What we're hoping is that these shoppers would just look at the lower prices for fresh parts and realize they could put them in their freezers for month-long use just as easily."

Turkey products are among the fastest growing poultry categories in commissaries.

Competition From Club Stores?

The few civilian outlets where Tyson does sell IQF chicken pieces in poly bags are the relatively new "price club stores," large discount supermarkets which require shoppers to pay membership fees.

These club stores sell only frozen poultry, not fresh, and Ed Jared said they have had "unbelievable growth" in selling the same kind of IQF poultry parts that Tyson sells to military commissaries.

An added wrinkle is that many of these new price club stores are deliberately locating themselves near military bases, presumably to compete with the low prices commissaries have traditionally offered.

Tyson Foods, which sells both Tyson and Tastybird brands to the military market, also supplies about 95 percent of frozen chicken products to the price clubs, Jared said.

(It should be interesting to see if a competitive situation begins to shape up between the commissaries and the price clubs for poultry and other sales.)

"Further Processed" Poultry

Ever since poultry producers figured out that the sum of the parts of a bird is greater (in profits) than the whole, de-boned, precooked, flavored and shaped products marketed in dozens of forms have proliferated.

Tyson Foods and other poultry companies, at this writing, are in the process of introducing new specialty items of this type to the military market.

"The growth of the poultry category is very stable, but the real exciting growth is in entrees and specialty items using poultry as the main ingredient," Jared said.

BIGGEST POULTRY PRODUCERS—TURKEY

These figures, provided by the National Turkey Federation, are from the Nov/Dec 1985 issue of the trade publication *Turkey World*. Poundage represents *Live Weights*, and does not include "canner products" such as giblets. The figures are from 1984, but are the most recent available in what NTF spokesman David Goldenberg called a "jealously guarded industry":

Company	Live Weight Pounds Per Year
Louis Rich Foods	340 million
Swift-Eckrich	310 million
Cargill	220 to 225 million
Jennie-O Foods	195 to 200 million
Rocco Turkeys	185 million
Norbest	185 million
ConAgra	180 to 185 million
Jerome Foods	165 to 170 million
Cuddy Foods	155 million
House of Raeford	145 to 150 million

According to the National Broiler Council, the trend is starting for nuggets, patties, strips, entrees, fully roasted items and other specialties to be sold in the same case as fresh poultry.

Many commissaries, especially in the Air Force, are going along with this trend.

"AFCOMS has increased its poultry displays to respond to the needs of the consumers by increasing boneless and convenience or marinated items along with fresh poultry products," meat specialist Mike Domitrovich said. "We feature a complete poultry product mix."

ConAgra, which produces the Country Pride brand of fresh chicken popular in the military market, also makes a line of frozen entrees, many which feature poultry as a main ingredient.

To market them more effectively to commissaries, ConAgra recently consolidated its five leading frozen food companies into a new military division.

The major brands involved are: Banquet, Morton, Armour, Chun King, and Patio.

According to ConAgra's market research, Banquet is the leader in frozen chicken and turkey entrees sold in both civilian and military markets.

Seventeen of the top 100 frozen foods sold are poultry items, a company spokesman said. Of those, five are Banquet entrees.

In the military market, the most popular Banquet poultry entrees is the 32-ounce size Banquet Fried Chicken, sold in 90 percent of all CONUS commissaries, followed by the 32-ounce Banquet Hot and Spicy Fried Chicken, sold in 85 percent.

Turkey Talk

Louis Rich, the largest producer of "further processed" poultry products, uses lowfat turkey almost exclusively, and has become the second leading sliced luncheon meat company in the country. (Its parent, Oscar Mayer is number one, using red meats.)

"The trend today is to have more and more poultry hot dogs and lunch meats," said a Louis Rich military sales insider.

"Fifteen percent of U.S. hot dogs are now made with poultry as the main ingredient and the number is still rising. The percentage ten years ago probably would have been zero," he said.

"Even more poultry masquerades in 'regular' hot dogs, because U.S. government regulations allow up to 15 percent chicken or turkey without labeling the item as poultry, as long as the ingredients are listed."

Walter Aalbregtse, military sales

manager for Swift-Eckrich, whose best-selling items in the military are Butterball brand turkeys and boneless turkeys and turkey parts, agrees that turkey luncheon meat and ready-to eat turkey products are among the fastest growing poultry categories in commissaries.

Louis Rich is doing a brisk business selling prime cuts of turkey in hard chill display packages, the way chicken has been marketed for years.

The company's line of "turkey brots," fully cooked, quarter breasts of turkey in three flavors, is also doing very well in commissaries.

In fact, turkey is doing so well that some companies that have been strictly chicken producers are starting to expand more into the bigger birds.

Rockingham Poultry, for instance, which sells fresh and frozen chicken to more than 110 commissaries worldwide, was in the process of merging with turkey processor Wampler-Longacre as this article was being written.

> **The military market is fertile ground for poultry demand.**

Ironically, for commissaries which try to cater to shoppers who want economy prices, all the extra use of turkey in specialty products may hurt their ability to stock low-cost whole turkeys at holiday time.

One commissary officer who used to order a lot of lower-cost whole turkeys for his customers at Thanksgiving and Christmas said he can't get them any more because so much grade B turkey is going into processed products instead.

"In former years, about eight to ten percent of the turkey kill went to by-products. Now I figure it's about 33 percent," he said.

"I tried to order some grade B turkeys for my store at Thanksgiving time back in April, and there simply were none available."

Too Many Chicks?

According to the National Broiler Council, although the rise in chicken consumption has been steady, profits for poultry producers have started to slack off because of an over-plentiful supply.

One Perdue insider said that last year's drought, which killed some chickens in the field and drove prices up for a while caused most processors to over place chicks with growers, causing the present oversupply.

A source at the Gold Kist Poultry Division, which sells lots of tray packs of Young 'N Tender brand broilers to military commissaries as well as Young 'N Tender Cornish hens, agreed that oversupply has depressed prices lately.

But he pointed out that this means chicken will continue to be a good buy for consumers for the next six to nine months.

Several sources said the negative publicity the industry received following a "60 Minutes" expose on salmonella contaminatin in chickens also hurt sales temporarily, but they are already starting to improve again as the demand for poultry grows.

The military market seems to be a particularly fertile ground for poultry demand.

Tyson Foods' poultry sales to the military are up 15 to 17 percent and that's "very good in a flat military market," according to Ed Jared.

And at Rockingham Poultry, Keith Buse said he wished he had three times his present production level because sales increases have been so tremendous in certain commissaries.

"I'm very excited about the future of poultry sales to the military," Buse said.

"The military shoppers are value, quality, nutrition and health conscious, and all these criteria are met by poultry." ■

BIGGEST POULTRY PRODUCERS—CHICKEN

These figures, provided by the National Broiler Council, are estimates of output of the top chicken producers for mid-1987. The poundage is all broiler, dressed weight, in-package:

Company	Pounds Produced Per Week	Market Share
Tyson Foods	45 million	15.5%
ConAgra	32 million	11.0%
Holly Farms	26 million	9.0%
Gold Kist	25 million	8.6%
Perdue	24 million	8.3%
Pilgrim's Pride	24 million	8.3%
Hudson Foods	12 million	4.1%
Wayne Poultry	11 million	4.1%
Foster Farms	11 million	4.1%
Fieldale Corp	10 million	3.4%
Marshall Durbin Co	8 million	2.8%
Townsends	8 million	2.8%
Showell Farms	8 million	2.8%
Cargill	7 million	2.4%
Sanderson Farms	7 million	2.4%
McCarty Farms	6 million	2.1%
Rockingham Poultry	5 million	1.7%
Cagle's	5 million	1.7%
Simmon's	5 million	1.7%
Campbell Soup	5 million	1.7%
Golden Rod	4 million	1.4%
Choctaw Maid	4 million	1.4%
Zacky Farms	4 million	1.4%
Allen Family Foods	4 million	1.4%

The Health & Beauty Aids Market: Creativity Sells

BY SANDY EVANS

Military exchanges – with the help of many of its suppliers – are getting more creative in marketing and promoting health & beauty aids. And these new approaches, from devoting more space to a specialty category of related products to having famous personalities come in and sign autographs, to setting up a computer to analyze a woman's cosmetic colors, are increasing sales in AAFES, NAVRESSO and Marine exchanges throughout the world.

AAFES is now displaying all ethnic hair care products together, a move which has increased sales largely by increasing the number of add-on sales. Test marketed last year to tremendous positive customer response, the planograms for the new display area were distributed to AAFES bases internationally beginning in June 1987.

Maybelline sent Miss Universe to an Air Force, Navy and Marine base in California to sign autographs and generate excitement last year. The supplier supported these guest appearances with promotions themed around the season and discount pricing allowances that provided tie-in discounts at the bases during the promotion. These events triggered record cosmetic sales at all three bases involved, and were enthusiastically applauded by base personnel.

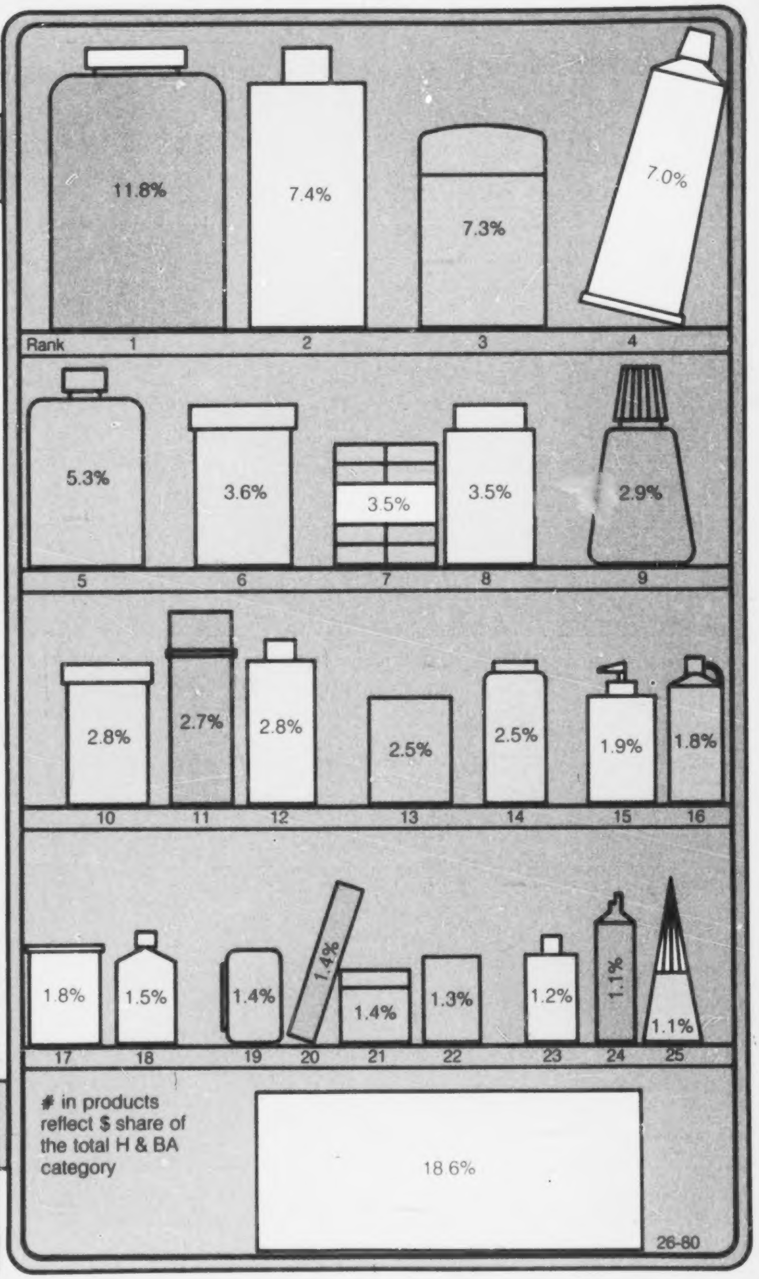
Max Factor, part of the Revlon Group, is sending a computer to selected exchanges this fall – the computer serves as a color analyst, discerning a person's best colors for makeup and wardrobe by analyzing the patron's skin tones and her answers to several questions.

Sandy Evans is a Washington, D.C.-based freelance writer. She has written widely about marketing, retailing, and business subjects for several leading trade and consumer publications.

CATEGORY SHARE OF TOTAL U.S. H & BA*

Rank	Category	$ Volume % change vs. year ago
1	Analgesics	+12.5
2	Shampoos	+ 1.7
3	Deodorants	+ 4.8
4	Dentifrices	− 0.9
5	Cough/Cold Liquids	+ 7.8
6	Cold Tablets, Caplets & Capsules	+15.1
7	Razor Rack	+ 0.4
8	Vitamins and Tonics	+ 2.7
9	Mouthwashes	+ 8.0
10	Antacids	+10.0
11	Hair Sprays	+11.9
12	Hair Conditioners & Rinses	+ 2.9
13	Menstrual Tampons	+ 6.6
14	Baby Care Products	+ 3.7
15	Hand Preparations	+ 8.4
16	Contact Lens Preps	+24.1
17	First Aid Products	+ 5.9
18	Laxatives	+ 7.4
19	Eye Make Up Products	+ 0.1
20	Toothbrushes	+ 9.7
21	Face Creams & Lotions	− 0.7
22	Denture Products	+ 3.3
23	Hair Coloring Products	+ 7.0
24	Hair Styling Products	+ 7.3
25	Nail Care Products	+ 3.4
26-80	All Others	+ 3.0

*TOWNE OLLER (1/86 through 12/86)



These are just a few samples of creative marketing that is sweeping both military and retail markets as suppliers and retailers alike work to keep the H&BA category growing. And growing it is.

A $9 billion industry, health and beauty aids is on a steady upswing, reporting a 7.7 percent increase in dollar volume the second quarter of 1987, up from a 6.6 percent growth in the second quarter of 1986, according to Joan Aveni, Director, Sales Analysis Division, Towne Oller & Associates Inc. The research marketing firm, which audits H&BA products shipped from warehouses to supermarkets, credits the growth of in-house pharmacies within food stores as a key in the healthy growth of the overall industry. Aveni also focuses on the importance of brands, noting that all brands ranked in the top 2,000 represent 81.3 percent of the sales in the overall category.

"Health and beauty aids are what brings a person into the store," states Dick Scott, Director of Special Markets Division, Johnson & Johnson. "Personal care products are bought every day." Referring specifically to such products as analgesics—the largest H&BA category—and dental (or oral hygiene) items, Scott's observation holds true throughout the H&BA category . . . these are the items everyone uses, everyone must buy. The key is finding ways of getting them to buy these everyday products from the exchange. And the more creative the marketing approach, the more successful.

Selling the Line

Several suppliers are promoting the concept of selling the line rather than single items—grouping like products together to encourage add-on sales, similar to AAFES' approach with ethnic hair care products. Johnson & Johnson makes it easy, by offering Oral Hygiene Centers—a simple display that holds dental floss and toothbrushes in a minimum amount of space with maximum visual appeal.

Bausch & Lomb is following this philosophy in its new color coding of packages, making it easy for customers to see—through the use of color bars across the center of the package—what contact lens care products can be used together. These new color coded packages are scheduled to begin shipping in August 1987.

Helene Curtis uses this approach with its new line of shampoos, Salon Selectives. Displayed together, the line of shampoos and conditioners invites the customer to mix and match to find the best combination of products for his/her particular hair. Steve Kimple, AAFES hair care buyer, notes that the new line is enjoying success at AAFES exchanges.

On a larger scale, the same concept is directing the grouping of many designer fragrances into one unified display at both the Navy and AAFES bases. "We're really upgrading the (designer fragrance) department, putting all the prestige fragrances for men and women in one area," at AAFES bases, notes AAFES buyer Avis Coltrain.

"There's lots of excitement with designer fragrances," adds Navy senior buyer Glenn Hoffman. "Last year we had a banner year in fragrance sales, enabling us to put out a separate Christmas flyer specifically for fragrance and cosmetics this year. This is sure to generate enthusiasm and greater sales for these hot categories."

> **"Health and beauty aids are what brings a person into the store."**

The introduction of several new designer fragrances into military exchanges makes the emphasis on this category a logical one. Oscar de la Renta is finally selling through military exchanges—a move some military buyers have been pushing for for ten years. Liz Claiborne hit military exchanges in August, and Elizabeth Taylor's new fragrance, Passion, will debut in military exchanges this fall.

Targeting New Market Niches

Many consumers tend to believe that different is always better—especially if the difference directly suits their taste and needs. Thus the fragmentation of categories, to produce the specific, targeted product for a unique market niche. Though the more individual products offered by one brand the fewer brands an exchange can carry, still there are several examples where such fragmentation pays off.

For example, as of August, AAFES started carrying a cosmetic product called Foltene, designed for people who are losing their hair. Though very expensive, the product has been highly successful in Europe. AAFES' Kimple is expecting strong sales from Foltene, particularly because distribution is limited to department stores and military exchanges, and thus will be something of an exclusive for the large AAFES bases which will carry the Italian product.

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Lamaur, well-known for its strategy of targeting a small niche through its success with Permasoft, a line of hair care products specifically designed for women with perms, is repeating its winning formula, this time aiming at a broader market base with its new line of shampoos and conditioners especially formulated for fine, limp hair. Textra began shipping to exchanges in August; the ad campaign accompanying the new product introduction will run from August through December, according to Alexander Villa, Military Sales Director, Lamaur Inc.

In deodorants, Arrid is trying to corner a bit of the special niche market as well. It has just introduced a Glide-On deodorant – a new concept where a clear gel is pushed through an applicator, so the user can control how much deodorant comes out of the package. The new Arrid Glide-On was stocked in military exchanges in July and August, to coincide with the July advertising kickoff.

Especially for Kids

Several manufacturers are targeting a very special market niche – the under-12 set. Oral B has introduced Muppets toothpaste, to complement its Muppets toothbrush, the number one selling youth toothbrush in AAFES exchanges, according to buyer Avis Coltrain. Oral B's Muppets Toothpaste, in a pump, offers two different flavors in two decorated tubes – one designed as Kermit, one as Miss Piggy. Coltrain said AAFES stores tried the new products as one-time buys in May; strong sales dictated that the product be added to regular stock.

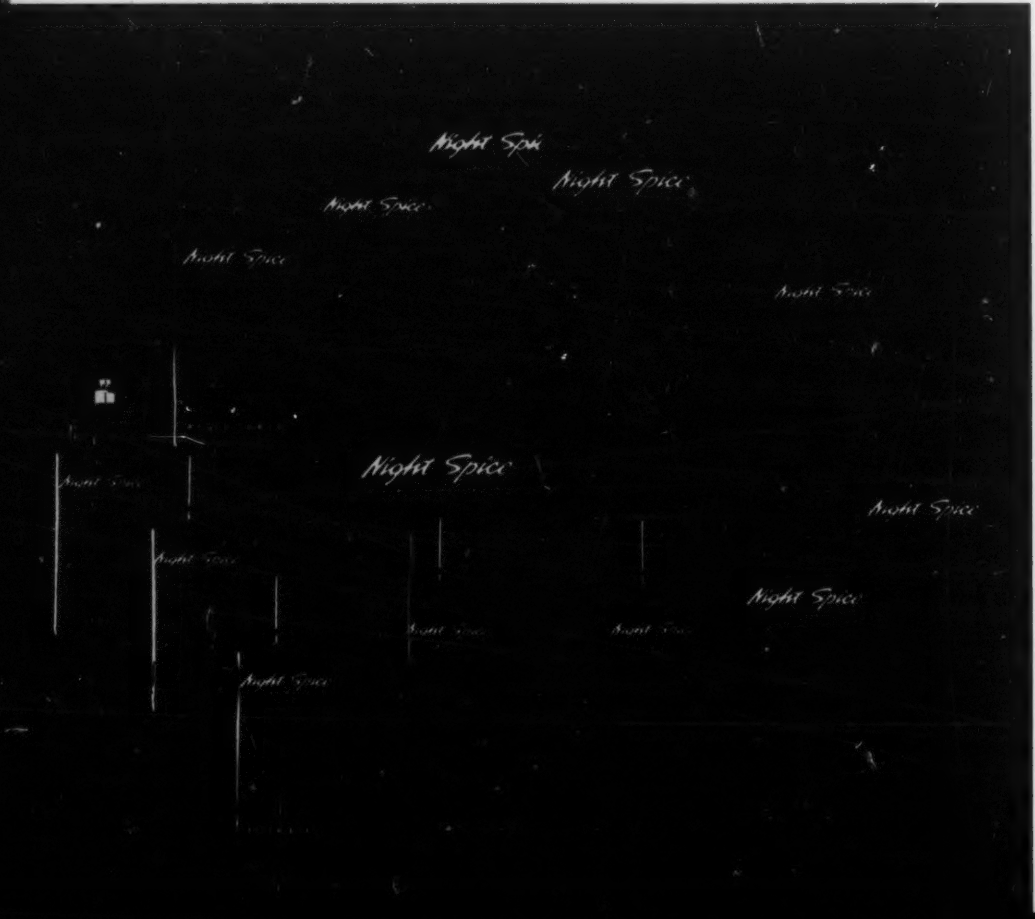
> **The more creative the marketing approach, the more successful.**

Another kiddie-oriented product, that also plays on the concept of selling the line, is Revlon's new "Care for Kids." Mousse baby shampoo in formulas for infants and toddlers and children's, plus grooming implements such as baby scissors, nail shapers, styling shears and nail clips, are packaged in soft, pastel colors to please mother and child. Promotional materials emphasize the control and ease of use along with the fun aspect of the product.

Adding Sizzle With Special Events

The Marines have always placed emphasis on being physically fit; this interest is reflected in the strong sales racked up at Camp Pendleton in body-building H&BA products. After the exchange grouped all of its body-building products together, it realized even healthier sales in the category, largely attributed to a greater number of products offered. To keep sales pumped up, the base invites athletes to come in and sign autographs, and schedules suppliers to come in with presentations, answering questions about body-building in general and their products' role in particular, run in conjunction with a promotion on the product line.

"Most of our customers are single men under 25," notes Andree Bergman, HBA buyer, Camp Pendleton. "Our base is mostly active duty, so the high interest in physical fitness makes sense. It's certainly a good category for us – last year we saw



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a 22 percent increase in body building and fitness products." Bergman is planning to increase special promotions this year, to keep those sales figures in top shape.

Special events are also popular with cosmetic departments. The Revlon Group in particular is offering some dazzling special effects this year, according to Richard Metzler, President, Government Sales, The Revlon Group. For example, Ultima II will be visiting selected exchanges with makeup artists this fall, who will apply makeup to a customer and videotape the process, so the patron can watch the transformation-in-process. The shopper will then be presented with her videotape as a gift with a purchase of Ultima II products.

Revlon will launch its "Passport to Beauty" program, in which patrons have makeup applied by a makeup artist, and are photographed following the transformation. The photo becomes part of a permanent file which the shopper keeps; this file also containes information regarding the specific makeup used to achieve the dazzling results captured in the photograph.

Going Direct

Sweepstakes still hold their important position in the area of special events to promote H&BA goods, and follow coupons as the most popular method of "going direct," to reach out directly to the consumer. Faberge offers an excellent example of this creative marketing technique with its "Go For Glamour" sweepstakes to promote Aquanet products, featuring celebrity Donna Mills and 500 million pop-up game cards distributed through national women's consumer magazines.

> **"There's lots of excitement with designer fragrances."**

A unique twist to this national sweepstakes is the tie-in of a coupon on the game card. Explains Mark Goldstein, Executive Vice President, Marketing, Faberge, consumers must take the game piece to the store to match it up with the display. Each game piece offers up to one dollar off in coupons for Aquanet products; since the consumer is already in the store, in front of the Aquanet display, holding the coupon in-hand, the chance of her using that coupon for a purchase is greatly increased.

Faberge is also planning its first-ever corporate group promotion for this fall. Themed "Faberge Fall Festival of Values," the promotion will distribute 400 million coupons on October 25 through free-standing inserts in Sunday newspapers, offering eight coupons on different Faberge products. The coupon drop will tie in with point-of-purchase displays in exchanges and stores, and Faberge is offering lucrative trade allowances to encourage exchanges to discount products during that period.

Taking the sweepstakes/coupon concept one step further, Lederle Laboratories sent a personal letter along with its coupons to a very targeted list of consumers. To educate consumers on its new bulk forming laxative, Fibercon, the first such laxative in an easy-to-swallow tablet form, Lederle sent first class letters to a list of 400,000 users of its most direct competition, Metamusil. According to Robert M. Lynch, Director of Marketing, Consumer Health Products, Lederle, this carefully culled list was sent a sample of the product, a coupon, and a letter from a well-known doctor explaining the benefits of Fibercon. Lynch reports the firm received 32,000 positive responses – an incredible success by any standards.

"The level of communication with customers must increase if a firm is to remain successful in today's competitive environment," Lynch points out. "We now have marketing people making as many calls as sales people to our customers – exchanges and stores – to talk about what we're doing, our future plans and direction. The level of communication with the ultimate consumer must also increase to be successful; I think we proved that with the dramatic success of our targeted direct mail effort."

"The key, really, is creative marketing – finding new ways to build excitement, be it through new products, new displays, new promotions. You just can't get stale." ■

Military Bases Get Respect

"The military patron receives better service in the cosmetic department of a military exchange than in any other class of trade. Why? Because the military bases know they will be selling to the same customer year after year. Every military patron is seen as a long-term investment, and is catered to. It is not peculiar for us to have a customer receive a makeup chart in a base in Houston, and pull that chart out in Heidelberg. Thus we see the patron as someone worth educating, and we see the market as an area worth investing our time and promotional dollars and service." So stated Richard Metzler, President, Government Sales, The Revlon Group, in a recent interview. His views were echoed by other major suppliers to the military bases, particularly in the areas of cosmetics and fragrances.

"We feel the military base is a good customer for us – we work with military exchanges all over the world," said Don Weldon, Vice President, National Accounts, Maybelline. "We can tailor special promotions for military exchanges, and offer them special prices, which is good both for the exchange and for Maybelline."